DOCUMENT RESUME

ED 441 965 CE 080 243

AUTHOR	Loock, Joan W.; Schmitt, Bette
TITLE	Wisconsin's Model Academic Standards for Business. Activities Guide. Bulletin No. 00190.
INSTITUTION	Wisconsin State Dept. of Public Instruction, Madison.
ISBN	ISBN-1-57337-081-9
PUB DATE	2000-03-00
NOTE	359p.; Foreword by John T. Benson.
AVAILABLE FROM	Publication Sales, Wisconsin Department of Public Instruction, Drawer 179, Milwaukee, WI 53293-0179. Tel: 800-243-8782 (Toll Free).
PUB TYPE	Guides - Classroom - Teacher (052) -- Tests/Questionnaires (160)
EDRS PRICE	MF01/PC15 Plus Postage.
DESCRIPTORS	*Academic Standards; Adult Education; Behavioral Objectives; Business Administration; Business Communication; *Business Education; Career Development; Career Education; Career Planning; Communication Skills; Competence; *Competency Based Education; Computer Literacy; Computer Science; Consumer Education; Economics; Economics Education; Entrepreneurship; Ethics; High Schools; Information Systems; Information Technology; *Integrated Curriculum; International Trade; Interpersonal Competence; Job Search Methods; Law Related Education; Leadership; Leadership Qualities; Learning Activities; Lesson Plans; Marketing; Models; Money Management; Nontraditional Students; Performance Factors; Portfolios (Background Materials); Programming; *State Standards; Statewide Planning; Teamwork; Technical Writing
IDENTIFIERS	*Wisconsin

ABSTRACT

This document, which is intended for teachers of high school-level business education courses, contains both the academic standards for business education in Wisconsin secondary schools that were disseminated in 1998 and learning activities to enable students to meet the standards. The activities were developed for students completing grade 12 and were designed in the Wisconsin Instructional Design System format. All activities reflect state-of-the-art technology and concepts and are intended to serve as examples and a catalyst for instruction. Although some activities are specific for courses, others may be integrated into a variety of courses. All standards are cross-referenced to Wisconsin's standards for English language arts, mathematics, and social studies. The document is divided into 11 sections that include the following components: content standards; performance standards; and learning activities. The learning activities include some or all of the following elements: standard addressed; directions for completing the activity; scenarios; scoring standard; rating scale; scoring guide; and directions to the teacher. The section topics are as follows: communications; information systems/technology; financial procedures; economics; entrepreneurship; marketing; international business; principles of management; principles of law; interpersonal and leadership skills; and career development. (MN)

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WISCONSIN'S MODEL ACADEMIC STANDARDS FOR

Business

Activities Guide

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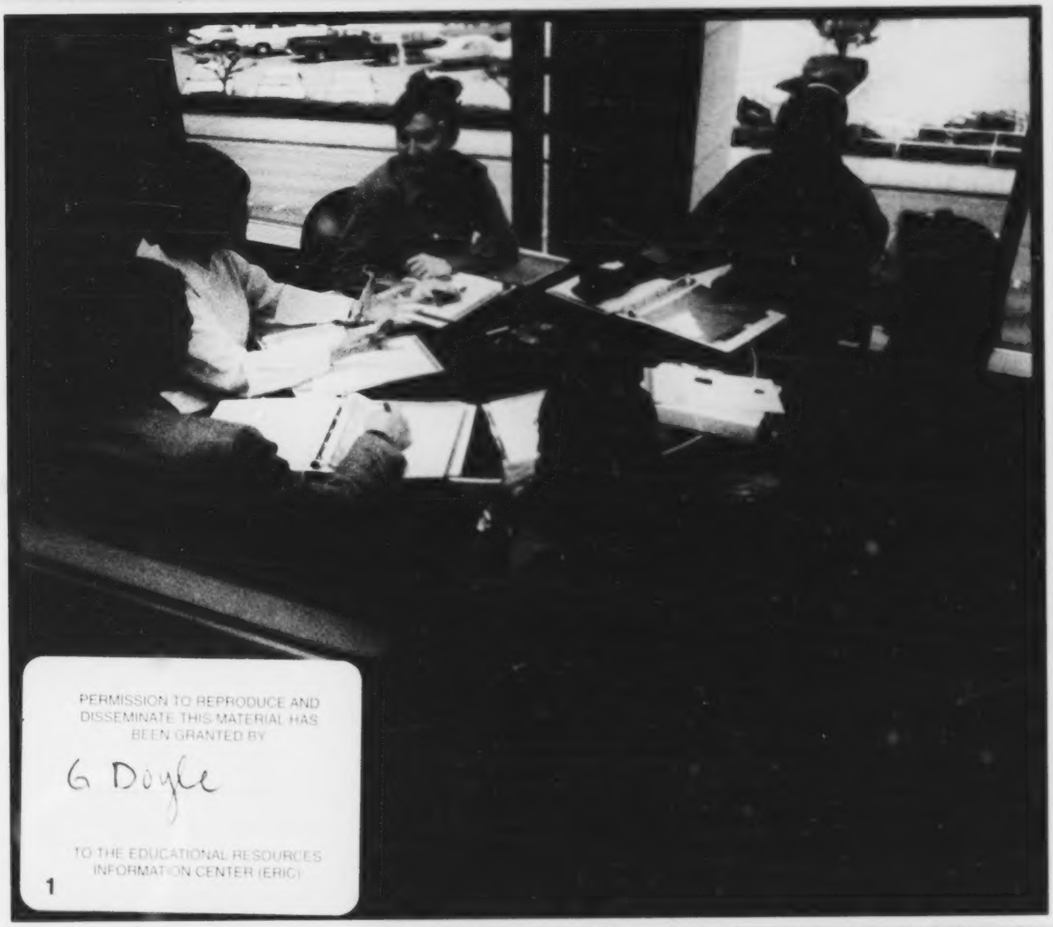

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Wisconsin's Model Academic Standards for Business

Activities Guide

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Wisconsin Department of Public Instruction
Madison, Wisconsin

This publication is available from:

Publication Sales
Wisconsin Department of Public Instruction
Drawer 179
Milwaukee, WI 53293-0179
(800) 243-8782

Bulletin No. 00190

© March 2000 Wisconsin Department of Public Instruction

ISBN-1-57337-081-9

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Printed on
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Acknowledgments

Many dedicated individuals contributed to this guide, and thanks are owed to all of them for their labor, persistence, patience, and expertise throughout the term in which it was conceptualized, drafted, revised, and produced for publication.

The members of the statewide committee that generated the initial ideas for this guide were appointed by State Superintendent John T. Benson in recognition of their knowledge of and interest in effective business education. The Department of Public Instruction gratefully acknowledges their professional commitment in producing an exciting, innovative activity guide. The committee included the following people.

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Foreword

A Letter From the State Superintendent

The outlook for careers in business has never been brighter. The economic development of a state is dependent on how effectively its resources are used to provide a work force geared to meet the needs of business and industry. Therefore, it is imperative to educate all students for and about business, to instill in Wisconsin's youth and non-traditional students, the basic tenets of small business and entrepreneurship, and to mold a new kind of employee.

Wisconsin's Model Academic Standards for Business that were disseminated in 1998 have proved to be beneficial to educators as they structure the curriculum and to students as they prepare for further education and work. Now we have the classroom activities which will assist teachers in the delivery of the business standards. The scoring guides will also be excellent tools for the teacher to assess the students' achievements.

In closing, I want to commend the members of the task force who gave freely of their time to produce the activities in this document.

John T. Benson

John T. Benson
State Superintendent

Introduction

Business activities are such an integral part of the day-to-day routine that most people do not realize the importance or scope of the American business enterprise. While business education's primary mission is to prepare students for business occupations and to teach students about business, **there is an even stronger need to educate all students for and about business, to instill in America's youth and non-traditional students, the basic tenets of small business and entrepreneurship, and to mold a new kind of employee.**

The business standards which were disseminated in 1998 are designed to develop students' comprehensive competence. They begin engaging elementary students in the excitement of the study of business and lead them progressively to higher levels of rigor in each succeeding level. At the completion of secondary school, students should be able to:

- Function as economically literate citizens through the development of personal consumer economic skills, a knowledge of social and government responsibility, and an understanding of business operations.
- Demonstrate interpersonal team work and leadership skills necessary to function in multicultural business settings.
- Develop career awareness and related skills to enable them to make viable career choices and become employable in a variety of business careers.
- Select and apply the tools of technology as they relate to personal and business decision making.
- Communicate effectively as writers, listeners, and speakers in social and business settings.
- Use accounting procedures to make decisions about planning, organizing, and allocating resources.
- Apply the principles of law in personal and business settings.
- Prepare to become entreprenuers by drawing from their general understanding of all aspects of business.
- Understand the interrelationships of different functional areas of business and the impact of one component on another.
- Develop the ability to participate in business transactions in both the domestic and international arenas.
- Develop the ability to market the assets each individual has whether they be in the labor market or in the consumer goods market.
- Manage data from all of the functional areas of business needed to make wise management decisions.
- Utilize analytical tools needed to understand and make reasoned decisions about economic issues—both personal and societal.

These standards have been cross-referenced to the standards for English language arts (LA), mathematics (M), and social studies (SS). Using the cross referencing, teachers of business education can demonstrate that students with a business background may increase their success on the high school graduation test.

During 1999, a group of educators met to develop activities designed to aid the instructor in delivering these standards. They were designed to answer the question, "How do I assist my students in achieving these competencies?" The activities were developed only for students completing grade 12 and were designed in the Wisconsin Instructional Design System (WIDS) format. Some may be for specific courses while others may be integrated in a variety of courses.

Content standards are followed by relevant activities; a scoring guide is provided for the activities within each content standard. The activities reflect state-of-the-art technology and concepts. However, they are only examples and should be used as a catalyst for instruction. Classroom instructors have found these activities beneficial to students as they teach concepts and values important to their school community.

Communications

CONTENT STANDARD

Students in Wisconsin will communicate in a clear, courteous, concise, and correct manner on personal and professional levels.

Written Communications

Rationale: Whether in the school setting, workplace, or in one's personal life, it is essential to be an effective writer.

Oral Communications

Rationale: Speaking and listening are essential communication skills. Whether in a personal or formal setting, communicators are required to listen, follow instructions, and deliver coherent messages.

Workplace Communications

Rationale: Communication skills are essential to be successful in the workplace.

PERFORMANCE STANDARDS

A.12.1 Use a variety of references and resources (electronic and printed) for the purpose of written business documents
A.12.2 Produce technical writing such as memos, forms, instructions, letters, and resumes, for appropriate audiences
A.12.3 Write formal and informal reports supported by appropriate graphic aids
A.12.4 Analyze and respond in writing to business situations (both individually and collaboratively)
A.12.5 Participate in group discussions for problem resolution
A.12.6 Organize and lead discussions; participate in meetings; answer questions in formal and informal situations
A.12.7 Identify and overcome major barriers to listening
A.12.8 Assess and respond to a speaker's nonverbal messages
A.12.9 Give examples of how nonverbal messages have different meanings in various cultures
A.12.10 Demonstrate interactive listening techniques
A.12.11 Demonstrate strategies for overcoming communication barriers
A.12.12 Respond appropriately to the audience and the situation
A.12.13 Demonstrate effective negotiation skills
A.12.14 Describe strategies for communicating with supervisors
A.12.15 Describe strategies for communicating with co-workers
A.12.16 Describe strategies for communicating with customers/clients
A.12.17 Prepare persuasive messages for a variety of situations
A.12.18 Accept or decline a request
A.12.19 Identify elements of good customer service
A.12.20 Participate as a productive member of a group

Electronic Searching

Standards

A.12.1	Use a variety of references and resources (electronic and printed) for the purpose of written business documents (see LA B.12.1, F.12.1, F.8.1)
A.12.3	Write formal and informal reports supported by appropriate graphic aids (see LA B.12.1, B.12.3, E.12.1)

Directions

In this activity you will find and evaluate information you locate on the World Wide Web and present your findings in a graphic format. You are to research Technical Writing courses that are offered over the Internet (or your instructor may assign a different topic).

1. Visit at least 10 sites that offer Technical Writing courses.
2. As you visit each site, evaluate the course offered. Take notes on the following:
   - Web site address
   - Course title
   - Organization offering the course
   - Special course features
   - Entrance requirements
   - Costs
3. Present your findings in a written report. Create a graphic that will allow others to compare and contrast your findings. You might create a chart, a spreadsheet, etc. Prepare a 1-page written report to supplement your findings. In your report include the following:
   - A summary of your findings
   - A recommendation for the best 2-3 courses. Include your reasons for recommending the courses
   - A reference to the chart/graph you created with your findings

Student Name ______________________ Date ____________________

Electronic Searching

Scoring Standard

You must achieve a rating of at least "2" or "yes" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds requirement
2= Meets requirement
1= Does not meet requirement fully
0= Is not present, or is incomplete or incorrect

Scoring Guide

Criteria	**Rating**	**Comments**
1. Report includes a summary of your findings	3 2 1 0	
2. Report includes a recommendation for the best 2-3 courses	3 2 1 0	
3. Report includes reasons for your recommendations	3 2 1 0	
4. Report includes references to the chart/graph	yes no	
5. Graphic includes Web site address	yes no	
6. Graphic includes the course title and organization offering the course	yes no	
7. Graphic includes special course features	yes no	
8. Graphic includes entrance requirements for the course	yes no	
9. Graphic includes course costs	yes no	
10. Report is word processed and professionally presented	3 2 1 0	

Teacher ______________________ Date ____________________

Directions to Teacher

1. Review the directions and scoring guide. If desired, have students research a variety of courses that relate to a specific topic you might be studying: investments, lending, business trends, etc.
2. Show ways that the students might present information graphically. It might be necessary for students to be trained on how to use spreadsheet software.
3. If time allows, have students present their findings in class.

Standard

A.12.2 Produce technical writing such as memos, forms, instructions, letters, and resumes, for appropriate audiences

Directions

For this activity, develop the memo, instructions or letter as described in the scenarios below.

1. Read through the scenario.
2. Identify the purpose and audience for the document.
3. Organize your ideas and determine the appropriate format for the document.
4. Word process your documents. Use the appropriate format.
5. Submit your documents and the scoring guide to your teacher for evaluation.

Scenarios

Scenario 1

You work in the school office of your high school. Joan Brown from Johnson City High School called to ask for written directions to your school. The school district is about 25 miles north of your school. Write a memo to Joan and include written directions to the school building.

Scenario 2

Write a memo to the payroll department notifying them that there is a mistake in your last paycheck. Explain exactly what the error is and give precise information.

Scenario 3

Write a letter to Big Book Store, 1441 Nelling Avenue, St. Paul, MN 55110. Order a book of your choice and have it billed to your address.

Student Name ______________________ Date __________________

Technical Writing

Scoring Standard

You must achieve a "satisfactory" rating on each criterion to demonstrate competence.

Rating Scale

Satisfactory= the student completed the criteria accurately and completely

Unsatisfactory= the student did not cover the criteria accurately and completely

Scoring Guide

Criteria	**Rating**	**Comments**
1. Documents are word processed in appropriate format	satisfactory unsatisfactory	
2. Documents are organized	satisfactory unsatisfactory	
3. Documents contain the correct tone and vocabulary for intended audience	satisfactory unsatisfactory	
4. Documents are prepared within the established timeline	satisfactory unsatisfactory	
5. Documents contain sufficient detail and evidence to fulfill their purpose and support the message	satisfactory unsatisfactory	

Teacher ____________________________ Date __________________

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Directions to Teacher

1. Review the directions and scoring guide. (Revise the scenarios or add additional situations if desired.)
2. Review the appropriate format for directions, memos and letters. Make available necessary reference materials for students.

Communicate with Customers

Standards

A.12.4	Analyze and respond in writing to business situations (both individually and collaboratively) (see LA B.12.1, F.12.1)
A.12.8	Assess and respond to a speaker's nonverbal messages (see LA C.12.2)
A.12.16	Describe strategies for communicating with customers/clients
A.12.17	Prepare persuasive messages for a variety of situations
A.12.18	Accept or decline a request
A.12.19	Identify elements of good customer service

Directions

For this activity you will work with another student to role-play a customer service situation.

1. Read through the scenarios below. Choose one of the scenarios to role-play with another student. You should play the part of the Customer Service Representative. The other student should play the person described in the scenario.
2. Before your role-play, review the Customer Service Policy to determine the best course of action to take.
3. Role-play the scenario. Both students should try to act realistically.
4. Complete the Customer Service Report to summarize the outcome of the situation.

Make sure both students have a chance to role-play the part of the Customer Service Representative in the scenario.

Scenarios

Scenario 1

You are a Customer Service Representative for Highview Hotel. A hotel guest has come to complain that the hotel room is poorly cleaned. Dirty towels were left on the floor, the refrigerator in the room was not wiped out, and the garbage cans were not emptied.

Scenario 2

You are a Customer Service Representative for Highview Hotel. A hotel guest is complaining because he/she wanted a nonsmoking room, but none were available. Unfortunately, it wasn't because the hotel was full, but rather because you were short of maid service that day and the rooms had not been cleaned. The guest was put into a smoking room with the promise that they had recently been "aired out." After one night of stay the guest has come to complain that the room still "stinks." The guest has three remaining nights at the hotel.

Scenario 3

You are a Customer Service Representative for Highview Hotel. A crisis is in the making. Marketing double-booked the Waterford Banquet Room for this evening. The Bigley Company is planning to host their annual sales dinner in the room for 40 people. However, the Sánchez family is also scheduled to host Grandpa Juan's 80th birthday party for 20 people in the room. Catering just notified you of the error by phone. They were unaware of the Sánchez party and have the room set up for the Bigley Company. One of the Sánchez family members came early to decorate and is quite angry that the room is unavailable. You have two smaller party rooms (where you could squeeze in 20 people), one much larger party room (that seats 100), and a corner of the restaurant available to offer the Sánchez family. A member of the Sánchez family is on the way to your office now.

Customer Service Policy

At Highview Hotel, giving exceptional customer service means going the extra mile with enthusiasm, eagerness, and innovation.

Customers want to know that you will treat them the way they deserve to be treated. As a Customer Service Representative at Highview you are expected to:

- Go the extra mile for our customers.
- Find ways to give them more than they expect.
- Treat your customer the same way you would treat an honored guest invited into your home.
- After the business transaction, make some follow-up contacts to insure your customers are satisfied.
- When you make a mistake, make it right with the customer.
- If there is any doubt in your mind, always rule in favor of the customer.
- Always remember . . . The customer is the reason you have a job.

All Highview Hotel employees are empowered to respond immediately to customer service problems by making adjustments up to $150 without receiving manager approval. Adjustments may include (but are not limited to) the following:

- Adjusting the price of a room
- Offering a complimentary room upgrade
- Offering a complimentary breakfast, lunch or dinner in our dining room
- Offering to move a guest to another room
- Offering to waive the price of the room

Do what you have to do to take care of the customer. After every transaction, file a Customer Service Report.

x

Customer Service Report

Your Name	**Date**
Customer Name	
A Complete Description of the Customer Complaint:	
Action(s) Taken to Satisfy the Customer:	
How well did you handle the customer's request? How effective and efficient were you?	
What could you do differently next time to promote Customer Service at Highview?	

Student Name ______________________ Date ________________

Customer Service Report

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations fully
1= Meets expectations, some rework or redesign may be required
0= Does not meet expectations; work is incomplete, incorrect or missing

Scoring Guide

Criteria	**Rating**	**Comments**
1. Report is word processed in the appropriate format	3 2 1 0	
2. Report includes a complete description of the customer complaint in non-judgmental terms	3 2 1 0	
3. Report includes a description of the actions taken to satisfy the customer; the actions are in accordance with the Customer Service Policy	3 2 1 0	
4. Report includes a comment on how well you handled the situation	3 2 1 0	
5. Report includes suggestions for how the situation could be handled differently	3 2 1 0	
6. Report is professionally presented	3 2 1 0	

Teacher ____________________________ Date ________________

Directions to Teacher

1. Divide students into pairs.
2. Review the directions and scoring guide.
3. Discuss the Customer Service Policy attachment. Distribute copies of the Customer Service Report form. You might request that students word process a copy of the form for completion, or you could create a Customer Service Report word processing template for students to complete.
4. Describe the process for the role play. Each student should take a turn role-playing the Customer Service Representative.

Write a Code of Conduct

Standards

A.12.5	Participate in group discussions for problem resolution (see LA C.12.13)
A.12.6	Organize and lead discussions; participate in meetings; answer questions in formal and informal situations (see LA C.12.13)
A.12.10	Demonstrate interactive listening techniques (see LA C.12.3)
A.12.13	Demonstrate effective negotiation skills
A.12.20	Participate as a productive member of a group

Prompt

A local employer has made the decision to create a code of conduct for all employees at the company. A task force has been charged with gathering information about employer behavior codes and preparing a sample code for all employees in the company.

Directions

For this activity you will work as a member of a task force (small group) to create or revise a code of conduct for a specific group or business.

1. Read through the Trail User's Code of Ethics, a sample code of conduct.
2. Choose a group or business for your code of conduct. Consider the following: companies you or your relatives work for, groups you participate in at school or as an extracurricular activity, companies in your business community, school groups, professional organizations, etc. You might also consider national groups such as the NBA, the Olympics, or the Boy Scouts. Obtain approval from your instructor for your topic choice.
3. Review the Code of Conduct scoring guide to see how you will be evaluated on this activity.
4. As a task force, collect information you need to develop the code of conduct. Split search duties to ensure each task force member collects information from different sources. Use the Internet, e-mail, interviews, professional literature and/or company manuals to conduct your research. Your sources should be up-to date, relevant, and reliable (authoritative). You might want to obtain samples from other groups or businesses. If the organization has a code of conduct, obtain a copy.
5. Brainstorm a list of items to be included in your code of conduct. Discuss the elements and reach consensus on what your code of conduct will include.

6. Prepare a draft copy of your code of conduct as a one or two-page document. Evaluate your draft for thoroughness, clarity, appropriateness and accuracy. Make sure you have included all of the elements you identified in your brainstorming session. Revise your work if necessary.
7. Publish a final copy of the code of conduct.
8. Evaluate the other members of your group using the scoring guide.

Trail User's Code of Ethics

Here are a few pointers on trail etiquette to ensure safe travel for trail users:

Protocol

Basically, hikers yield to horses and bikers yield to everyone. In certain situations this may not be the case, but use your head to ensure everyone's safety.

Communicate

Greet other users and if necessary, warn your passers of upcoming trail conditions.

Courtesy

Conflict between users can only result in trail closure. Common courtesy by everyone can avoid conflict and maintain trail enjoyment.

Stay on the trail

Keep on existing trails to minimize impact in the backcountry. This is especially true in the alpine environment where vegetation is very fragile.

Limit trail damage

Traveling along trails during heavy spring runoff or in wet conditions can seriously damage a trail route, especially if you are riding an ATV, bike or horse. Limiting use during these conditions can go a long way to maintaining trail quality.

Respect private property

In urban areas, many trails travel through private land tracts. Respect these areas and their rules in order to keep the owner-trail relationship a positive one.

Student Name ______________________ Date __________________

Task Force Team Member Evaluation

Scoring Standard

You must achieve an "observed" rating on at least 7 of the 10 criteria to demonstrate competence.

Scoring Guide

Criteria	Rating	Comments
1. Task force member contributed relevant information, asked relevant questions or answered questions directly during the meeting(s)	observed not observed	
2. Task force member used appropriate eye contact with all members of group when leading discussion	observed not observed	
3. Task force member took turns participating in the discussion without interrupting other members	observed not observed	
4. Task force member demonstrated courteous and attentive listening strategies to all speakers during discussion	observed not observed	
5. Task force member responded to other members in an acceptable manner	observed not observed	
6. Task force member shared in the problem resolution process by gathering information	observed not observed	
7. Task force member used correct tone and vocabulary during discussions	observed not observed	
8. Task force member contributed to helping accomplish the goal(s) of the group	observed not observed	
9. Task force member used appropriate questioning skills (open-ended, closed, yes/no/maybe)	observed not observed	
10. Task force member showed support of the group decision	observed not observed	

Teacher ______________________ Date __________________

Code of Conduct

Scoring Standard

Your group project must achieve a rating of "2" on all criteria to demonstrate competence.

Rating Scale

2= Exceeds expectations
1= Meets expectations
0= Not observed

Scoring Guide

Criteria	**Rating**	**Comments**
1. Code of Conduct is presented in an attractive, appropriate format	2 1 0	
2. Code of Conduct list rules of acceptable conduct for individuals	2 1 0	
3. Code of Conduct incorporates valid information collected from up-to-date and reliable resources	2 1 0	
4. Code of Conduct is thorough and accurate	2 1 0	
5. Code of Conduct is clear and concise	2 1 0	

Teacher ______________________________ Date ____________________

Directions to Teacher

1. Divide learners into groups of 4-6 (each group is a task force). Review the directions and scoring guides. Indicate that students will be working on the code of conduct, but emphasis is on working together as a small group. Describe how they will use the scoring guides to evaluate themselves and other members of their group.
2. You may want to assign businesses or groups for students to work with.
3. Provide time for groups to complete their research and write the code of conduct (some portion of two class periods to allow time for research in between). Examples of industry codes of conduct can be found on the following websites:

Certified Financial Planners	*http://www.cfp-board.org*
Professional Accountants	*http://www.ifac.org*
Builders	*http://www.nvo.com/capecodbuilders/codeofethics*

4. If desired, have groups present their code of conduct to the class.

Orally Present Cultural Protocol

Standards

A.12.7	Identify and overcome major barriers to listening (see LA C.12.2, C.12.3)
A.12.9	Give examples of how nonverbal messages have different meanings in various cultures (see LA D.12.2)
A.12.11	Workplace Communications—Demonstrate strategies for overcoming communication barriers
A.12.12	Respond appropriately to the audience and the situation

Prompt

Next month your company will be hosting a group of international business customers. You are in charge of introducing co-workers to the correct protocol for working with the international customers as well as suggesting ways to assist in the business negotiations that will undoubtedly take place while the visitors are at your company. You will make a presentation to your co-workers at the next company meeting.

Directions

For this activity you will prepare and give a presentation on the business protocol appropriate for a particular country.

1. Read the prompt above.
2. Select a foreign country to research for protocol and negotiation techniques. You must use at least three up-to-date, relevant, reliable research sources. Research the following information:
    - Common stereotypes and biases demonstrated in our culture toward the visiting culture
    - At least ten examples of how messages may be affected by factors such as culture, gender, status, language and nonverbal cues
    - At least ten culturally-specific rules of protocol for communication
    - Rules of protocol for conducting business negotiations and how to deal with them
3. Prepare and deliver an oral presentation to your co-workers presenting the information you discovered. Use appropriate visual aids to support your information. Make sure your presentation meets all of the requirements on the scoring guide.

Student Name ______________________ Date ________________

Orally Present Cultural Protocol

Scoring Standard

You must achieve a rating of "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations
0= Not observed

Scoring Guide

Criteria	**Rating**	**Comments**
1. Presentation includes common stereotypes and biases demonstrated in our culture toward the visiting culture	3 2 1 0	
2. Presentation includes at least ten examples of how messages may be affected by factors such as culture, gender, status, language and nonverbal cues	3 2 1 0	
3. Presentation includes at least ten culturally-specific rules of protocol for communication	3 2 1 0	
4. Presentation includes the rules of protocol for dealing with business negotiations	3 2 1 0	
5. Presentation confirms the accuracy of the information by citing at least three up-to-date, relevant, reliable, reference resources	3 2 1 0	
6. Presentation is clearly prepared for the specified purpose and audience	3 2 1 0	
7. Presentation provides appropriate visual aids as necessary to support information	3 2 1 0	
8. Presenter interacts/responds appropriately with the audience	3 2 1 0	

Teacher ______________________________ Date ________________

Directions to Teacher

1. Review the directions and scoring guide.
2. You may want to assign specific countries for students to research as information may not be readily available on all countries.
3. You may want to have the other students (the co-workers) evaluate the presenters. If so, you will need to provide additional copies of the scoring guide.

Communicating with Supervisors and Co-workers

Standards

A.12.14 Describe strategies for communicating with supervisors
A.12.15 Describe strategies for communicating with co-workers

Directions

In this activity you will conduct an interview with someone in business regarding communication with supervisors and co-workers.

1. Set-up an interview with someone in a business setting. This is not a job interview, it is an interview for the purpose of gathering information. You will act as the interviewer. You can conduct your interview over the phone or in person as directed by your instructor. The purpose of the interview is to determine the communication practices used with co-workers and supervisors at the business.
2. Before your interview, do some research on good business communication strategies and principles for use in the workplace. Do your research on the Internet or use materials available in your library or classroom. Determine at least six strategies or principles. Create a list of your findings.
3. Conduct your interview.
    - Share with the person you are interviewing the list of communication strategies you created. Ask the person to comment on whether the strategies/principles are used at his/her workplace. Probe for specific examples of situations when the strategy/principle was used or not used. Record the examples.
    - Ask the person to comment on typical communication problems that exist among co-workers. Record at least two examples.
    - Ask the person to comment on typical communication problems that exist between workers and supervisors. Record at least two examples.
4. Write a report summarizing the information you found in your interview and research.
    - Begin with a description of the interview: the name of the person you interviewed, the organization where he/she works, his/her job title, and how you conducted your interview (in person or over the phone).
    - Provide at least two examples of typical communication problems that exist among co-workers in the organization. Follow the examples with your recommendations of specific strategies for addressing the problems.
    - Provide at least two examples of typical communication problems that exist between workers and supervisors. Follow the examples with your recommendations of specific strategies for addressing the problems.

- Close with a summary of at least six strategies or principles for good communication in the workplace. Use the findings from your research.

5. Make sure your report meets the requirements on the scoring guide. Submit your report and scoring guide to your teacher for evaluation.

Student Name ______________________ Date ____________________

Workplace Communication Report

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is incorrect, incomplete, or missing

Scoring Guide

Criteria	**Rating**	**Comments**
1. Report includes a description of the interview	3 2 1 0	
2. Report includes at least two examples of communication problems among co-workers	3 2 1 0	
3. Report includes recommendations for addressing the co-workers' communication problems	3 2 1 0	
4. Report includes at least two examples of communication problems between workers and supervisors	3 2 1 0	
5. Report includes recommendations for addressing the communication problems	3 2 1 0	
6. Report includes at least six strategies or principles for good communication among co-workers and supervisors in the workplace	3 2 1 0	
7. Report is organized and mechanically correct	3 2 1 0	
8. Report is professionally presented	3 2 1 0	

Teacher ______________________________ Date ____________________

Directions to Teacher

1. Review the directions and scoring guide.
2. Assist students in locating people to interview. If students are currently employed they could use their current job site.
3. Provide resources for researching good communication practices in the workplace.

Business Standards B

Information Systems/Technology

CONTENT STANDARD

Students in Wisconsin will select and apply current information systems / technology as they relate to personal and business decision-making in light of ethical and social issues.

Rationale: Information systems/technology continue to change. Students must be able to select from and apply the tools available. In order to make informed decisions, students must learn current technology as well as understand ethical and social issues related to the use of technology.

PERFORMANCE STANDARDS

B.12.1	Access, navigate, and use on-line services
B.12.2	Identify and use communication software
B.12.3	Enter and manipulate data using the touch method on a ten-key pad
B.12.4	Import text and graphics from other software programs
B.12.5	Use the integration features of a software package
B.12.6	Restart and recover from system failure and virus infection as necessary
B.12.7	Identify and compare types of programming languages
B.12.8	Contrast careers in the information technology industry
B.12.9	Describe emerging hardware and software
B.12.10	Import, export, and merge data
B.12.11	Identify electronic storage media
B.12.12	Analyze spreadsheet data
B.12.13	Use desktop publishing software to create documents
B.12.14	Use common features of multimedia software
B.12.15	Identify laws and rules pertaining to computer crime, fraud and abuse
B.12.16	Practice a code of ethics for information systems
B.12.17	Describe how the information technology industry impacts society
B.12.18	Send and receive faxes
B.12.19	Use electronic mail
B.12.20	Send and respond to voice messages
B.12.21	Sort and file documents according to established procedures

Internet Cafeteria Plan Search

Standard

B.12.1 Access, navigate, and use on-line services

Prompt

You are never too young to consider the long-term impact that employment decisions will have on your future. When making employment decisions, you should thoroughly explore the benefits packages the employer offers. Because benefits packages will vary from one company to another, you should carefully analyze the pay and the benefits package. Many companies offer what is called a cafeteria plan for their benefits package.

Directions

In this activity you will explore the Internet for information, use an Internet search engine to locate additional information, and record trends for each of the benefits. Follow the directions below.

1. Explore the Internet for information on cafeteria benefit plans at the URLs listed below. Answer these questions as you navigate through the sites:
   a. What is a cafeteria plan?
   b. Why is the term cafeteria plan used?
   c. What is Section 125?
   d. What benefits are typically included in a cafeteria plan?
   e. What are the potential problems with cafeteria plans?
   f. What is the future of cafeteria plans?

Ideal Technical Services	*http://www.ideal4u.com/benefits.htm*
Workplace Issues	*http://www.afscme.org/wrkplace/cafe.htm*
Benefits Link	*http://www.benefits.com*

2. As you conduct your research on cafeteria benefit plans, link to information that relates to the following benefits:
   - Health
   - Profit sharing
   - Flexible spending accounts
   - Employee discounts
   - Paid vacations and paid holidays

   Be sure to record all websites visited. Note the differences and similarities in these areas.

3. Use an Internet search engine to locate additional information about cafeteria plans. Locate specific companies that provide different benefits to their employees. Record trends for each of the benefits. Be sure to record all websites visited.
4. Evaluate the information collected about benefit packages and cafeteria plans. Determine if additional research needs to be conducted to provide adequate material.
5. Using either spreadsheet software or the table feature of your word processing software, prepare a table that summarizes your findings. In the first column list the benefit; in the second column provide a brief description; in the third column identify the pro or con of the benefit as it relates to you; in the fourth column evaluate the importance of the benefit for your team at this time of your life; and in the fifth column list two examples of companies that offer this benefit. In a separate table, list all websites visited.

Student Name ______________________ Date __________________

Internet Cafeteria Plan

Scoring Standard

You must achieve a minimum score of "2" on criteria 1 - 5 and a "yes" on criteria 6 - 7 in order to demonstrate competence.

Rating Scale

3= Proficient; able to perform task independently and exceeds basic criteria

2= Intermediate; can perform tasks at expected level with little or no assistance

1= Introductory; is familiar with process but may need assistance in completing

0= Is unable to complete process, even with assistance

Scoring Guide

Criteria	Rating	Comments
1. You log on and view information from preselected sites on the Internet	3 2 1 0	
2. You use the functions of a web browser to navigate and save World Wide Web sites	3 2 1 0	
3. You choose appropriate search engines and directories to locate specific resources on the Internet or other on-line services	3 2 1 0	
4. You perform simple and advanced searches about topic on a search engine	3 2 1 0	
5. Table contains answers to all required research questions	3 2 1 0	
6. Content of table is organized	yes no	
7. Table format is appropriate	yes no	

Teacher ____________________________ Date __________________

Directions to Teacher

This activity can be adapted to any subject for any course using the given format. Allow a minimum of two days to search for material and one day to prepare table and oral presentation. While learner competence for some of the criteria on the scoring guide will be evident from the table the learner submits, you will also need to observe the learner engaging in the search process to be able to accurately rate competence for some of the criteria.

Prepare Schedule and Send E-mail

Standards

B.12.2	Identify and use communication software
B.12.19	Use electronic mail

Prompt

You are the president of the local Volunteer Association and chair the community service committee at your company. You are combining the effort of both organizations into a community project. Both the Volunteer Association and your company are co-sponsors in a blood pressure screening at City Hall. The screening will be free and will be on the last Thursday in June from 8 a.m. to 7 p.m. Create a schedule for the volunteers for that day using your word processing software. Send an e-mail to the mayor and the president of your company to remind them of the event. Attach the volunteer schedule you created.

Directions

For this activity, you will perform two tasks:

1. Create a schedule based on the scenario using your word processing software.
2. Send a simultaneous e-mail with an attachment to the recipients specified in the scenario.

As indicated in the scoring guide, your e-mail messages must include an introduction, appropriate details about the schedule, and a conclusion.

Student Name ______________________ Date __________________

Prepare Schedule and Send E-mail

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Proficient; able to perform task independently and exceeds basic criteria

2= Intermediate; can perform tasks at expected level with little or no assistance

1= Introductory; is familiar with process but may need assistance in completing

0= Is unable to complete process, even with assistance

Scoring Guide

Criteria	**Rating**	**Comments**
1. You send an e-mail message with an attachment to both the president and mayor simultaneously	3 2 1 0	
2. Electronic message includes an introduction	3 2 1 0	
3. Electronic message includes appropriate details	3 2 1 0	
4. Electronic message includes a conclusion	3 2 1 0	
5. You save sent messages to an address book	3 2 1 0	

Teacher ____________________________ Date __________________

Directions to Teacher

You will need to use predetermined e-mail addresses for the mayor and president. A suggestion is to use your school and home e-mail addresses. You may also want your network administrator to set up special accounts just for this purpose. You will also need to look at your learners' accounts to verify that they saved to an address book.

Use a Ten-key Pad

Standard

B.12.3 Enter and manipulate data using the touch method on a ten-key pad

Directions

The accuracy of each number in a list is critical to providing precise information to the reader. The speed and efficiency in which the numbers are keyed are also crucial to manipulating the data. You will be asked to enter data using the ten-key pad with correct technique, and then to print out a list. This exercise will be timed. You must:

1. Key in the list of names, room numbers and phone extensions provided to you by your instructor.
2. Print the list in ascending alphabetical order.
3. Print another copy in ascending numerical order according to room number.
4. Print another copy in ascending numerical order by phone extension.

Use a Ten-key Pad

Below is the list of names, room numbers and phone extensions you will need for this activity.

NAME	ROOM	EXT.
Dystra, Terry	A12	426
Arnold, Amy	C32	129
Straub, Susan	C64	386
Murphy, James	B02	948
Wallace, Curtis	B17	635
Ruderer, Carolyn	A09	521
Boehnen, Martin	C80	712
Popelka, Ryan	A18	103
Dowd, Daniel	B04	019
Nasim, Asaf	C51	547

Student Name ______________________ Date __________________

Use a Ten-key Pad

Scoring Standard

You must achieve a rating of at least "2" or "yes" on each criterion to demonstrate competence.

Rating Scale

3= Completely or nearly accurate
2= Mostly accurate
1= Somewhat accurate
0= Almost totally inaccurate; many mistakes

Scoring Guide

Criteria	**Rating**	**Comments**
1. Names are accurately keyed	3 2 1 0	
2. Room numbers are accurately keyed	3 2 1 0	
3. Extension numbers are accurately keyed	3 2 1 0	
4. List is printed in alphabetical order	3 2 1 0	
5. List is printed in ascending numerical order according to room number	3 2 1 0	
6. List is printed in ascending numerical order according to phone extension	3 2 1 0	
7. You complete tasks within time limit	yes no	

Teacher ____________________________ Date __________________

Directions to Teacher

This is one of two activity options.

This activity may be completed using a table word processing software or in a spreadsheet. Provide students with a list of names, room numbers and phone extensions or use the yellow pages to provide complete phone numbers for businesses of one type. As this is an in-class timed activity, you will need to determine an appropriate time limit, and start timing once you pass out the list of names.

Develop a Spreadsheet

Standard

B.12.3 Enter and manipulate data using the touch method on a ten-key pad

Directions

Develop a spreadsheet that keeps track of your grades in this course. Prior to this activity, record on a piece of paper all the assignments possible, the points possible for each, and the number of points you received. (Your teacher may provide you with this information.) Bring this sheet on the day of the assessment.

1. Key in the name (or type) of each assignment, the number of points you earned and points possible for each assignment.
2. Add the total points possible and the total number of points you earned.
3. Calculate the percentage of total points you have earned this far in the course. In order to figure out the percentage of points you have earned, divide the number you have earned, by the total number of points possible. Then, move the decimal point over two places.
4. Update the spreadsheet throughout the remainder of the course.

Develop a Spreadsheet

Below is the name of a student, her assignments, points scored and points possible to be used in this activity:

Name: Mary Miller

ASSIGNMENT	POINTS POSSIBLE	POINTS EARNED
Ex. 4 p. 12	10	8
Ex. 2A p.26	15	14
Paragraph	10	10
Workbook p.86	25	23.5
Quiz 1	50	47
Ex. 39 p.107	5	4.5
Essay	30	18
Ex. 53 p.249	15	14
Quiz 2	50	35
Final Exam	125	113

Student Name ______________________ Date ________________

Develop a Spreadsheet

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion; minor revision needed
1= Meets some of the criterion; substantial revision needed
0= Does not meet criterion

Scoring Guide

Criteria	Rating	Comments
1. Spreadsheet includes the names of each assignment	3 2 1 0	
2. Spreadsheet includes the number of points possible for each assignment	3 2 1 0	
3. Spreadsheet includes the number of points you earned for each assignment	3 2 1 0	
4. Spreadsheet includes the total number of points possible	3 2 1 0	
5. Spreadsheet includes the total number of points you have earned	3 2 1 0	
6. Spreadsheet includes a calculation of the percentage of total points you have earned	3 2 1 0	
7. Spreadsheet values and formulas are formatted correctly	3 2 1 0	
8. Spreadsheet labels are formatted correctly	3 2 1 0	

Teacher ____________________________ Date ________________

Directions to Teacher

There are two activity options for this standard.

If students do not have a record of their own grades in the course, provide them with the information of a fictitious student and grades for that student. Depending upon the level of students' skill in spreadsheets, you may want to add more formatting features to the activity. If you time the activity, you will need to determine an appropriate time limit.

Standard

B.12.4 Import text and graphics from other software programs

Directions

The following activity relates to image processing. You may be asked to print a task or have it viewed on the screen by your teacher. Although the emphasis of this activity is on image processing, correct spelling and grammar are essential.

Create a sign for parent-teacher conferences in your school. This sign will be displayed throughout town in local businesses to promote the conferences.

1. Open the word processing file provided to you by your instructor. This file includes the details about the conferences.
2. Copy the text and paste into your page layout software. Format the text appropriately.
3. Add a clip art image from CDs, disk or the network.

Teacher's Handout
Parent-Teacher Conferences

Below is the text to be copied and formatted into the sign learners create about parent-teacher conferences:

REMINDER: PARENT-TEACHER CONFERENCES
This is a reminder to all parents that ***there will be no school Tuesday and Wednesday of next week*** *due to parent-teacher conferences. Conferences will last 20 minutes each. If you feel you need more time, please arrange extra time at a later date with your child's teacher. Please make an effort to be on time, as teachers must meet with many parents. These conferences are an important part of your child's school development. The teachers at Jefferson Elementary look forward to meeting with you.*

Student Name ________________________ Date ____________________

Image Processing

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion; minor revision may be needed
1= Meets some of the criterion; substantial revision needed
0= Does not meet criterion

Scoring Guide

Criteria	**Rating**	**Comments**
1. Sign contains text from file	3 2 1 0	
2. Text is correctly formatted	3 2 1 0	
3. Sign contains clip art from CD, disk or network	3 2 1 0	
4. Sign contains correct spelling and grammar	3 2 1 0	

Teacher ______________________________ Date ____________________

Directions to Teacher

This is one of three activity options for this standard.

For this activity, word process the accompanying handout (about parent-teacher conferences) into a file that students can access either on the network or by disk. Use the accompanying scoring guide to evaluate the sign learners create.

Import Text and Graphics

Standard

B.12.4 Import text and graphics from other software programs

Directions

The following activity relates to image processing. You may be asked to print a task or have it viewed on the screen by your teacher. Although the emphasis of this activity is on image processing, correct spelling and grammar are essential.

You are to create a one-page informational flyer for the fourth-grade classroom. The flyer defines "What is a Rollercoaster?" and displays a picture of a rollercoaster.

1. Locate an image of a rollercoaster on the Internet. Save the image.
2. Locate supporting text for the photo. Save the text. Be sure to identify the source of the information.
3. Design the flyer in a page layout program, following correct design techniques. Insert the text and photo you located on the Internet.

Student Name ____________________ Date ______________

Import Text and Graphics

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion; minor revision needed
1= Meets some of the criterion; substantial revision needed
0= Does not meet criterion

Scoring Guide

Criteria	**Rating**	**Comments**
1. Flyer contains image imported from the Internet	3 2 1 0	
2. Flyer contains supporting text imported from the Internet	3 2 1 0	
3. Source of text information is identified	3 2 1 0	
4. Flyer is designed in a page layout program using correct design techniques	3 2 1 0	
5. Flyer contains correct spelling and grammar	3 2 1 0	

Teacher ________________________ Date ______________

Directions to Teacher

This is one option of an activity for this standard.

You may want to provide a different topic for each student. This activity could also be done in pairs if there are hardware and software limitations. (Note: there may be a fee charged for using photos located on the Internet.)

Photo Editing

Standard

B.12.4 Import text and graphics from other software programs

Directions

The following task relates to image processing. You will create a Certificate of Course Completion. You may be asked to print it or have it viewed on the screen by your instructor. Although the emphasis of this activity is on image processing, correct spelling and grammar are essential.

To create your certificate:

1. Either scan in a photograph of yourself or take a picture of yourself with a digital camera. Open the photograph in photo editing software to resize and crop the image. If necessary, make additional changes.
2. In a word processing program, create an award certificate for yourself for completing this course. Insert the photo you revised in step one.
3. Make sure there is a balance between written and image/graphic material.

Student Name ____________________ Date ________________

Photo Editing

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Proficient; able to perform criterion independently and exceeds expected level, no revision necessary

2= Intermediate; can perform criterion at expected level with little assistance, some revision necessary

1= Introductory; is able to perform criterion but needs assistance, much revision necessary

0= Unable to perform criterion

Scoring Guide

Criteria	Rating	Comments
1. You scan a picture (or take a digital picture) and save to a graphics file	3 2 1 0	
2. You crop or resize graphics as necessary	3 2 1 0	
3. You retrieve text and images from graphics file and insert them into the certificate	3 2 1 0	
4. Certificate is created using a word processing program	3 2 1 0	
5. Certificate has balanced written and image/ graphic material	3 2 1 0	
6. Certificate contains correct spelling and grammar	3 2 1 0	

Teacher ________________________ Date ________________

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Directions to Teacher

This is one of three activity options for this standard.

Depending upon the photo editing software students use, you may want to require additional features or changes to be made to the photo. The level of the students would also determine whether or not to provide wording for the certificate.

Standard

B.12.5 Use the integration features of a software package
B12.12 Analyze spreadsheet data

Prompt

You are employed by PerForm Enterprises, Inc., a wholesale distributor of computer products. PerForm has three sales representatives who travel to retail stores in their regions to sell these products. As a sales representative, each is entitled to reimbursement of typical travel expenses such as food, hotel rooms, and transportation. In addition, PerForm reimburses its representatives for certain other miscellaneous expenses.

You work in the accounting department of PerForm. One of your responsibilities is to keep records of the three sales representatives' expenses to analyze when new budgets are being reported. Each sales representative completes a daily expense report showing how much was spent in four categories: lodging, meals, transportation and miscellaneous.

Directions

One of the major changes taking place in business today is the use of personal computers to perform and integrate many office tasks. This simulation is divided into five steps. Each step uses a different software application.

Before beginning this project, you will need to create a folder named DATA**, with the asterisks representing your initials. All files you create in this project should be placed in this folder.

Step 1

1. Using the Daily Expense Reports information sheet, organize and input the data into a word processing table.
2. Print the table.

Step 2

1. Copy the word processing table into a spreadsheet.
2. For each sales representative, calculate the total for each daily expense report.
3. Calculate the totals for all expense categories for all sales representatives.
4. Print a copy of the spreadsheet with values and a copy with formulas.

Step 3

1. Import the spreadsheet into a database.
2. Design and print a report listing each region, total expenses for lodging, meals, transportation, miscellaneous, and total expenses. Also, create subtotals for each.
3. Print a copy of the report.

Step 4

1. In the spreadsheet, create a chart that will compare daily expense totals for each sales representative. Be sure to give the chart a title, legend, and label *x* and *y* axes.
2. Do not print the chart at this time.

Step 5

1. Create a mail-merge memo in the word processing software, reporting your findings after calculating the daily expense reports. The memo should be from you to each sales representative.
2. Include the following in your memo: totals for each region, grand total for all sales representatives for the week, the chart from Step 4, and any additional significant information found while preparing the expense reports.
3. Print each of the three memos, and the memo with the variable fields.

Daily Expense Reports

Below are the data for four sales representatives.

1. **Bob Parker**
   Expenses for the week of Dec. 6-10

   Date: Dec. 6
   Region: 6 – S. WI
   Lodging: 56.00 (Holiday Inn- Madison)
   Meals: Brkfst- $4.28; lunch- $7.54; dinner- $16.82
   Transportation: 172 mi. @ .32/mi. (Chicago- Madison)
   Misc: copies at Kinkos- $10.82; phone call to distributor- $5.94

   Date: Dec. 7
   Region: 2 – NW. Chicago
   Lodging: none
   Meals: brkfst- $5.64; lunch- $8.00
   Transportation: 172 mi. @ .32/mi. (Madison- Chicago); 43 mi. @ .32/mi. (NW Chicago-home)
   Misc: phone calls- $12.90

   Date: Dec. 8
   Region: 2 – NW. Chicago
   Lodging: none
   Meals: lunch- $18.36 (myself and client)
   Transportation: 86 mi. @ .32/mi. (roundtrip to NW suburbs and back)
   Misc: none

   Date: Dec. 9
   Region: 4 – Cleveland
   Lodging: $63.00 (Best Western, Cleveland)
   Meals: lunch- $6.12; dinner- $17.20
   Transportation: $282 (roundtrip airfare Chicago-Cleveland)
   Misc: rental car $39

   Date: Dec. 10
   Region: 4 – Cleveland
   Lodging: none
   Meals: brkfst- $4.39; lunch- $8.02
   Transportation:
   Misc: rental car $39

2. **Mario Olivo**
Expenses for the week of Dec. 6-10

Date: Dec. 6
Region: 4 – Cleveland
Lodging: $72.00 (Clinton House-Cleveland)
Meals: brkfst- $6.20; lunch- $24.45 (myself and two clients); dinner- $18.30
Transportation: $388 (roundtrip airfare Chicago-Cleveland)
Misc: rental car $24; phone calls- $8.25

Date: Dec. 7
Region: 4 – Cleveland
Lodging: $72.00 (Clinton House)
Meals: brkfst- $5.89; lunch- $32.12 (myself and three clients); dinner- $16.49
Transportation: none
Misc: rental car- $24; incidentals- $5.23

Date: Dec. 8
Region: 4 – Cleveland
Lodging: $72.00 (Clinton House)
Meals: brkfst- $4.29; lunch- $8.85; dinner- $15.30
Transportation: none
Misc: $24 rental car

Date: Dec. 9
Region: 1 – Central Chicago
Lodging: none
Meals: lunch- $21.00 (myself and client)
Transportation: 22 mi. @ .32/mi
Misc: none

Date: Dec. 10 Sick Leave
Region: none
Lodging: none
Meals: none
Transportation: none
Misc: none

3. Susan Johnson
Expenses for the week of Dec. 6-10

Date: Dec. 6
Region: 3 – NC Indiana
Lodging: $54.00 (Ramada- Fort Wayne)
Meals: lunch- $12.00; dinner- $18.00
Transportation: $180 (roundtrip airfare Chicago-Ft.Wayne)
Misc: presentation materials- $36.25

Date: Dec. 7
Region: 3 – NC Indiana
Lodging: none
Meals: brkfst- $6.00; lunch- $9.34
Transportation: none
Misc: none

Date: Dec. 8
Region: 1 – Central Chicago
Lodging: none
Meals: none
Transportation: 21 mi. @ .32/mi.
Misc: none

Date: Dec. 9
Region: 1 – Central Chicago
Lodging: none
Meals: none
Transportation: 26 mi. @ .32/mi.
Misc: software- $420

Date: Dec. 10
Region: 2 – NW Chicago
Lodging: none
Meals: lunch with client- $32.00
Transportation: 83 mi. @ .32/mi.
Misc:

Student Name ______________________ Date ________________

Spreadsheet Data Entry

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Proficient; performs criterion independently and exceeds expectations, no revision necessary
2= Intermediate; performs criterion at expected level with little or no assistance, some revision necessary
1= Introductory; is familiar with criterion but needs assistance in completing, much revision necessary
0= Unable to perform criterion

Scoring Guide

Criteria	Rating	Comments
1. You integrate a spreadsheet and table into a word processing document	3 2 1 0	
2. You integrate spreadsheet data into database	3 2 1 0	
3. You integrate database data into a word processing database	3 2 1 0	
4. You integrate data from a word processing table into a spreadsheet	3 2 1 0	
5. Table is organized and arranged appropriately	3 2 1 0	
6. Spreadsheet has correct formulas for daily totals	3 2 1 0	
7. Spreadsheet has correct formula for grand total	3 2 1 0	
8. Database report includes subtotals	3 2 1 0	
9. Database report is logical and attractive	3 2 1 0	
10. Chart is logical and attractive	3 2 1 0	

Teacher ____________________________ Date ________________

Directions to Teacher

This simulation takes approximately one week to complete. You may want to also evaluate other software skills in each of the software applications. This activity works well as a semester review for an exam or to summarize all skills learned throughout a course.

Surviving System Failure

Standard

B.12.6 Restart and recover from system failure and virus infection as necessary

Directions

Although devastating, a system failure and virus infection is a reality in today's world. The ability to troubleshoot common problems is a skill all computer users need. For this activity, you will be given four scenarios. Identify correct procedures to follow in the event of a system failure or virus infection.

Scenarios

1. You have just booted up your computer and it has an error message indicating that it was not properly shut down. It stops at this message and does not continue. What do you do?
2. You have just turned on your computer but nothing appears on the monitor. What do you do?
3. Your friend has just had a virus infect her computer. She is unaware of any software that is able to protect her system from this happening. What do you suggest to her?
4. You have been working on your computer for an hour and as you are about to save a document, a message appears that states that your computer has detected a virus. What do you do?

Student Name ________________________ Date ____________________

Surviving System Failure

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Proficient; performs criterion independently and exceeds expectations, no revision needed

2= Intermediate; performs criterion at expected level with little or no assistance, some revision needed

1= Introductory; is familiar with process but needs assistance in completing, much revision necessary

0= Unable to perform process

Scoring Guide

Criteria	**Rating**	**Comments**
1. You identify procedures used to restart and recover from a system failure	3 2 1 0	
2. You describe security plans for information systems	3 2 1 0	
3. You identify virus scan programs	3 2 1 0	
4. You suggest virus prevention procedures	3 2 1 0	

Teacher ______________________________ Date ____________________

Directions to Teacher

If possible, students should actually apply procedures to a system. Because that is not always possible, the scenarios create realistic situations. The student should provide general suggestions for each scenario, as well as specific steps to follow on your computer system. You may choose to give all scenarios to all students, or you may divide the scenarios among students. This activity can be completed orally or in writing.

Computer Programming Languages

Standard

B.12.7 Identify and compare types of programming languages

Directions

The programmer's job is to write instructions for the computer. Although programming is a very challenging career, a basic identification and comparison of programming languages is helpful to all computer users.

You will be given two computer program printouts that accomplish the same task, however they are written in different programming languages. In a written summary (one page or less) identify at least four differences and two similarities between the programs, providing examples of each similarity or difference.

Computer Programming Languages

Below are examples of two program printouts, written in different languages, that accomplish the same task (factorials). The first is in Visual Basic, and the second in C++.

An example in Visual Basic

```
Public Function lngNFactorial(intN As Integer) As Long
    ' Compute the value of intN factorial (intN!).
    Dim i As Integer
    Dim lngValue As Long

    ' Initialize the value of lngValue.
    lngValue = 1

    For i = 1 To intN
        lngValue = i * lngValue
    Next i

    lngNFactorial = lngValue

End Function
```

An example in C++

```
long NFactorial(int n)
{
    // Compute the value of n factorial (n!).
    int i;
    long lValue;

    // Initialize the value of lValue.
    lValue = 1;

    for (i = 1; i <= n; i++)
    {
        lValue *= i;
    }

    return (lValue);
}
```

Student Name ______________________ Date ________________

Computer Programming Languages

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion, minor revisions needed
1= Meets some of the criterion, substantial revisions needed
0= Does not meet criterion

Scoring Guide

Criteria	**Rating**	**Comments**
1. You identify at least four differences	3 2 1 0	
2. You identify at least two similarities	3 2 1 0	
3. You provide examples for each similarity or difference	3 2 1 0	

Teacher ___________________________ Date ________________

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Directions to Teacher

For this activity you will need to provide the students with a printout of two computer programs in different programming languages. You may use the accompanying handout, or obtain a sample from a text book, web page, or a computer science class at your school or local technical college. Although directions stipulate finding four differences and two similarities, you may want to ask learners to locate more of each, as there are more than four differences and two similarities in the examples provided; use your judgment depending on your students.

Standard

B.12.8 Contrast careers in the information technology industry

Directions

Careers in information technology are being revised and created each day. In order to make informed career choices and understand the direction of information technology within an organization, it is important to understand the structure and organization of an information technology department.

For this activity you are to develop an organization chart for an information technology department in a real company. You may obtain the information from an on-site visit, interview, annual report, or a website. You must document where/how you obtained your information. Include qualifications, duties, and salaries associated with each job. You should create your chart using diagramming software, word processing software, or page layout software.

Student Name ______________________ Date __________________

Develop an Organizational Chart

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion, minor revisions needed
1= Meets some of the criterion, substantial revisions needed
0= Does not meet criterion

Scoring Guide

Criteria	**Rating**	**Comments**
1. You illustrate the hierarchical structure of information technology careers within a company	3 2 1 0	
2. You list the qualifications for each position	3 2 1 0	
3. You list job titles associated with each position	3 2 1 0	
4. You compare salary ranges for each position	3 2 1 0	
5. You document where/how information was obtained	3 2 1 0	
6. Organization chart is logical and descriptive	3 2 1 0	

Teacher ____________________________ Date ___________________

Directions to Teacher

This is one of two activities for Business Standard B12.8.

This activity works well when combined with a field trip or guest speaker. However, there are a variety of sources from which the information can be obtained. When possible, have students use diagramming software, word processing software, or page layout software.

Research Information Technology Careers

Standard

B.12.8 Contrast careers in the information technology industry

Directions

Careers in information technology are being revised and created each day. In order to make informed career choices, it is important to understand the job duties, requirements, and education for careers in information technology. It is also significant to identify salary ranges and recognize trends in information technology careers.

For this activity you will research six different information technology careers using a variety of resources. You may obtain information from:

- the Internet
- the library
- guidance counselors
- interviews
- the WCIS Career Visions Program
- other sources

You will then develop a table that lists:

- education
- experience
- duties
- requirements
- salary ranges
- job outlook

You also must document your sources of information.

Student Name ______________________ Date ________________

Research Information Technology Careers

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion, minor revisions needed
1= Meets some of the criterion, substantial revision needed
0= Does not meet criterion

Scoring Guide

Criteria	**Rating**	**Comments**
1. Table contains six different careers in information technology	3 2 1 0	
2. Table lists the education requirements for each career	3 2 1 0	
3. Table lists the experience required for each career	3 2 1 0	
4. Table lists additional requirements for each career	3 2 1 0	
5. Table lists the duties associated with each career	3 2 1 0	
6. Table lists the salary ranges associated with each career	3 2 1 0	
7. Table lists the job outlook for each career	3 2 1 0	
8. Table documents sources of information	3 2 1 0	
9. Table contains correct spelling and grammar	3 2 1 0	

Teacher ___________________________ Date ________________

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Directions to Teacher

This is one of two activity options for Business Standard B12.8.

You may need to help learners identify various careers. If possible, provide in-class research time. The Internet and WCIS Career Visions program are excellent resources for this activity. Guest speakers also provide learners with insight into careers in action.

Purchase a Workstation

Standard

B.12.9 Describe emerging hardware and software

Directions

For this activity you will "purchase" a workstation by using classroom lecture material and by gathering additional material to help you make an informed decision. In a written report, you will compare and contrast two workstations made by different manufacturers and select and justify the one you would purchase. Use the "Purchase a Workstation" form your teacher will provide to you.

Purchasing a Workstation Project Guidelines

MAXIMUM AMOUNT: $________ (to be provided by teacher)

Step One — Requirements

List the requirements you feel are necessary in a workstation. Add additional space if you need it.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

Step Two — Data Collection

Select two workstations that meet the requirements you outlined in Step One. The specifications for ***ONE*** of the workstations can be derived from a source on the Internet. The second workstation must be from either a newspaper ad, mail-order magazine, flyer, advertisement or printout from a computer store.

1. Identify the sources from which you obtained your information:

   Workstation #1: ______________________________

   Workstation #2: ______________________________

2. List the components and component prices that you would choose for each workstation (use additional space if necessary):

   Workstation #1
   Components and Prices:

a.	f.
b.	g.
c.	h.
d.	i.
e.	j

Workstation #2
Components and Prices:

a.
b.
c.
d.
e.
f.
g.
h.
i.
j.

3. Cut and paste the advertisement used to a blank sheet of paper; print out the price information used from the Internet

Step Three — Compare and Contrast

Using the information from Step Two, analyze the two workstations that you selected. Be sure to include the type of warranty, service after sale, and their ability to be upgraded. Why did you select this type of computer and printer, including each of the components? This section needs to be in APA report format, and contain a minimum of 400 words. In your report, title this section *Compare and Contrast*. Apply computer terminology used in class.

Step Four — Purchase Decision

After preparing Step Three, choose which workstation you wish to purchase. To help you with this section, research and locate two sources of information that help justify your decision. Cite the sources in this section. This section needs to be in APA report format, and contain a minimum of 250 words. In your report, title this section *Purchase Decision*. Apply computer terminology used in class.

Step Five — Title Page

Prepare a title page for your report.

Student Name ______________________ Date __________________

Purchase a Workstation

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion, minor revisions needed
1= Meets some of the criterion, substantial revisions needed
0= Does not meet criterion

Scoring Guide

Criteria	Rating	Comments
PURCHASING A WORKSTATION PROJECT GUIDELINES FORM		
1. Form identifies maximum dollar amount	3 2 1 0	
2. Form lists workstation requirements	3 2 1 0	
3. Form identifies sources of information	3 2 1 0	
4. Form lists prices and components for each workstation	3 2 1 0	
5. Form is accompanied by ad and/or printout	3 2 1 0	
REPORT		
6. Report contains *Compare and Contrast* analysis section that is a minimum of 400 words	3 2 1 0	
7. *Compare and Contrast* analysis contains information regarding warranty, service and upgrades	3 2 1 0	
8. *Compare and Contrast* analysis contains explanation as to why certain components were selected	3 2 1 0	

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Criteria	**Rating**	**Comments**
9. Report contains *Purchase Decision* section that is a minimum of 250 words	3 2 1 0	
10. *Purchase Decision* section contains a rationale justifying purchase decision	3 2 1 0	
11. *Purchase Decision* section cites two sources that were used in the decision making process	3 2 1 0	
12. Report is written in APA format	3 2 1 0	
13. Report uses computer terminology used in class	3 2 1 0	

Teacher ________________________________ Date ____________________

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Directions to Teacher

Determine the maximum amount students are allowed to spend on the project. Then distribute copies of the accompanying "Purchase a Workstation" form to each student. This project could be done outside or inside class, depending on time.

Standard

B.12.10 Import, export, and merge data

Directions

There is a large variety of hardware and software used in the workforce today. The ability to import, export, and merge data within and between applications and platforms is critical for today's worker.

For this activity you will need to do the following:

1. Create a spreadsheet for your current class schedule. Include the hour, course name, teacher name, and room number.
2. Create a word processing table for textbooks used in each of your courses. Include the textbook name, the textbook authors, and the copyright date.
3. Export the word processing table as a text file.
4. Import the table into the spreadsheet.
5. Merge the data from the table into the existing class schedule data.
6. Print the new spreadsheet.
7. Submit the following items to your teacher:
   - Class schedule spreadsheet
   - Word processed table of textbooks
   - Class schedule and textbook spreadsheet

Student Name ________________________ Date ___________________

Import, Export, and Merge Data

Scoring Standard

You must achieve a score of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Proficient; performs criterion independently and exceeds expectations, no revision necessary
2= Intermediate; performs criterion at expected level with little assistance, some revision necessary
1= Introductory; is able to perform criterion but needs assistance, much revision necessary
0= Unable to perform criterion

Scoring Guide

Criteria	**Rating**	**Comments**
1. You import data from other applications	3 2 1 0	
2. You export data to other applications	3 2 1 0	
3. You merge data that has been imported	3 2 1 0	
4. Final spreadsheet uses correct format	3 2 1 0	
5. Final spreadsheet is logical	3 2 1 0	
6. Final spreadsheet uses correct spelling and grammar	3 2 1 0	

Teacher ______________________________ Date ___________________

Directions to Teacher

Depending on the software you are using, you may need to adjust the file type and commands given in the directions.

Research Electronic Media Storage Systems

Standard

B.12.11 Identify electronic storage media

Prompt

You are working for the Northland Company and your job is to assess types of electronic media storage to be used in your corporation. Follow the directions below to help you come to a decision.

Directions

For this activity you will research a company that produces electronic media storage (EMS). You will present your findings in an oral presentation accompanied by a visual. Before you begin your research your instructor needs to approve the company you have chosen. Once your company has been approved, find out the following information about your company:

1. The type of hardware they produce
2. The specification for that hardware
3. The uses of that hardware
4. The cost of that hardware
5. Any other pertinent information about that hardware

If your company produces more than one type of EMS, include the information above for each type.

Then, prepare a short oral presentation summarizing your research. Your presentation should be accompanied by a visual that includes a diagram of each EMS summarizing the information gathered about it.

Student Name ______________________ Date ________________

Research Electronic Media Storage Systems

Scoring Standard

You must achieve a score of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion, no revision needed
2= Meets most of the criterion, minor revision needed
1= Meets some criteria, substantial revision needed
0= Does not meet criterion

Scoring Guide

Criteria	**Rating**	**Comments**
1. Oral report includes summary of type of hardware company produces	3 2 1 0	
2. Oral report includes specifications for hardware	3 2 1 0	
3. Oral report includes uses for hardware	3 2 1 0	
4. Oral report includes cost of hardware	3 2 1 0	
5. Oral report includes other pertinent information related to the hardware	3 2 1 0	
6. Oral report is accompanied by a visual diagramming each EMS and the information presented in the report	3 2 1 0	

Teacher ______________________ Date ________________

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Directions to Teacher

Research for this project could be done on the Internet or by using publications which provide information on emerging hardware. The information could also be obtained through a field trip, guest speakers or interviews. The presentation may be individual or group and could be done as an oral or multimedia presentation. You will need to set a time limit and deadline for the presentation and supporting materials. It is also a good idea to pre-approve the companies chosen in order to avoid several presentations on the same company and software. You may add more specifics to the scenario, such as number of employees, current hardware and software or anything else you believe to be necessary.

Design a Newsletter Using Desktop Publishing

Standard

B.12.13 Use desktop publishing software to create documents (see LA E.8.3.)

Directions

For this activity you will work in groups to create and produce a newsletter according to the following guidelines.

Your newsletter may be for an organization, school or business. The information it contains is up to you. It must be copied on white paper with black ink, back-to-back on 8 ½" by 11" paper using at least three different fonts and sizes, and have a minimum of two pages.

1. Develop a paper sketch of the newspaper including computer features and applications to be used.
2. Using a desktop publishing program:
   a. Develop a masthead for the newsletter.
   b. Below the masthead state the purpose of the newsletter and the intended audience.
   c. Import text and graphics from the Internet into the newsletter (be sure to cite your sources!).
   d. Develop and include additional text, graphics, and/or scanned pictures.
   e. Implement four of the following graphic elements in the newsletter:
      - reverse text
      - drop/raised caps
      - graphics, sidebars
      - pull quotes
      - graphic lines
      - rotated text
      - watermarks
      - text art
      - bylines
      - border
      - tables
      - end of story markers.
   f. Produce mailable quality document and print the completed newsletter.
3. Use the scoring guide for this activity to self-evaluate your newsletter.

Design a Newsletter Using Desktop Publishing

Scoring Standard

You must achieve a minimum score of "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion; minor revision needed
1= Meets some of the criterion; substantial revision needed
0= Does not meet criterion

Student Name ______________________ Date __________________

Scoring Guide

Criteria	**Rating**	**Comments**
1. Newsletter contains a masthead	3 2 1 0	
2. Newsletter defines purpose and target audience	3 2 1 0	
3. Newsletter contains imported text and graphics	3 2 1 0	
4. Newsletter contains additional text, graphics, and/or scanned pictures	3 2 1 0	
5. Newsletter contains four of the designated graphic elements	3 2 1 0	
6. Newsletter contains correct grammar and spelling	3 2 1 0	
7. Newsletter is accompanied by a paper sketch listing computer features and applications used	3 2 1 0	
8. Newsletter is printed on white paper	3 2 1 0	
9. Newsletter is printed with black ink	3 2 1 0	
10. Newsletter is printed back-to-back	3 2 1 0	
11. Newsletter contains three different fonts and sizes	3 2 1 0	
12. Newsletter is a minimum of two pages	3 2 1 0	

Teacher ______________________ Date __________________

BEST COPY AVAILABLE

Directions to Teacher

Allow students to choose the topics for their newsletters. Provide class time for Internet searches to obtain text and graphics. Depending on the ability of your students and available equipment, you or the students can scan photos or use the digital camera. Place these files on the network or drives available to your students.

Prepare a Multimedia Presentation

Standard

B.12.14 Use common features of multimedia software.

Directions

A talent for public speaking is one of the greatest skills to possess. There will be many opportunities for you to implement this skill in school, work, and personal-related instances. To organize and present information to an audience, you could create overhead transparencies, 35mm slides, audience handouts, speaker's notes, or a computer-based slide presentation. This activity is based on using multimedia software to prepare a presentation.

1. Select a community hotel, motel, inn, restaurant, or supper club with community rooms for your presentation.
2. Create a clear, concise storyboard.
3. Build an object acquisition chart from the storyboard.
4. Identify and capture/create text, graphics, charts, sound, pictures, video, etc.
5. Develop a thumbnail sketch of each slide to aid in assembling the presentation.
6. Determine the interactive control between slides—include both timed and viewer activated.
7. Field test and make needed adjustments.
8. Use the scoring guide for this activity to self-evaluate your project.
9. Present to audience.
10. Be prepared to answer questions on content and construction of presentation.

Scenario

As Assistant to the Facilities Director, you are to create a computer-based slide presentation to promote the community rooms of a business. Include the following information:

1. Scanned or digital camera picture of the business with links to each of its community rooms.
2. List or show the types of activities that can be held in each room (meetings, parties, wedding receptions, etc.).
3. Use pictures, video, etc., to show the special features of each room.
4. Identify catering possibilities and costs.
5. Identify room accommodations and costs.
6. List or show the items the business can supply (tables/chairs, podium, sound system, etc.).

Prepare a Multimedia Presentation

Scoring Standard

You must achieve a score of at least “2” on each criterion to demonstrate competence.

Rating Scale

3= Proficient; performs criterion independently and exceeds expectations, no revision necessary

2= Intermediate; performs criterion at expected level with little or no assistance, some revision necessary

1= Introductory; is familiar with criterion but needs assistance in completing, much revision necessary

0= Unable to perform criterion

Student Name ____________________ Date ________________

Scoring Guide

Criteria	Rating	Comments
1. Project includes a clear, concise storyboard	3 2 1 0	
2. Slides include scanned or digital camera pictures of the business with links to each of its community rooms	3 2 1 0	
3. Slides include a list of the types of activities that can be held in each room	3 2 1 0	
4. Slides include pictures, videos, graphics, sound, etc., to show the special features of each room	3 2 1 0	
5. Slides include a description of the catering possibilities and costs	3 2 1 0	
6. Slides include room accommodation and costs	3 2 1 0	
7. Slides include a list of pictures of the items the business can supply (tables, chairs, podium, sound system, etc.)	3 2 1 0	
8. Slides contain a minimum of ten appropriate elements such as contrast between text and background, screen transitions/builds, movement of objects, sound, animation, video, graphics, pictures, font changes/sizes/styles, color schemes, font size and styles, bulleted items, labeled video/graphics/pictures, timing, activation buttons, etc.	3 2 1 0	
9. Design elements and content are effectively combined to enhance the presentation	3 2 1 0	
10. Project is within stated time limit and/or slide limit	3 2 1 0	
11. Project contains correct grammar, spelling, punctuation, and capitalization	3 2 1 0	
12. Project is logically sequenced with timed and viewer-activated slides	3 2 1 0	

Teacher ________________________ Date ________________

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Directions to Teacher

This activity assumes students have already been trained in using a multimedia software application and have created storyboards, acquisition charts, thumbnail sketches, practice slides/stacks, etc. If not, these must be covered before the learner can construct the presentation for this activity.

Use a community business, or create a fictitious business from brochures on hotels/motels/restaurants. The topic of the presentation can be changed to meet learner/school/worksite/community needs.

You can set the number of slides or make this part of the evaluation. Learners should make full use of applications, programs, equipment, and staff expertise available. If the topic is changed, this activity could be evaluated by other classroom teachers, worksite supervisors, mentors, peer group, community organizations, service organizations, etc. Refer learners to the Scoring Guide Criteria in order to complete the project.

Additional Ideas

1. Sales presentation for a product or equipment
2. Promotional presentation of the Business/Marketing Department or individual programs within the department
3. Introduce new teachers giving subjects taught, hobbies, family information, favorite saying, etc.
4. Family tree
5. Favorite holiday
6. My state
7. Promote or introduce a popular music group
8. Promote places of interest in the community
9. Promote a business in the community
10. Promote a community organization
11. Topics from other subject areas—chemistry demonstration, historical event/person, endangered species, author and work, foreign language tutorial of common words, etc.
12. Planning a tour of _________ or trip to __________

Standard

B.12.15 Identify laws and rules pertaining to computer crime, fraud and abuse

Directions

It is essential to be aware of computer crime, fraud, and abuse. Your personal well-being, money, privacy, development, artistic endeavor, etc., is at stake.

1. In order to become further aware of this type of crime, research and gather information regarding a case of computer crime, fraud or abuse. You may use the Internet, library, or materials provided by your teacher. Be sure to document where you obtained your information.
2. Create a 2-3 page word-processed report summarizing the case you researched including the laws and rules pertaining to the case, and the status or outcome of the case.
3. You will be evaluated according to the scoring guide for this activity.

Student Name ______________________ Date ________________

Computer Crime, Fraud or Abuse

Scoring Standard

You must achieve a minimum score of "2" in all numerical categories and a "yes" in all "yes/no" categories in order to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion; minor revision needed
1= Meets some of the criterion; substantial revision needed
0= Does not meet criterion
Yes= Criterion is complete
No= Criterion is not complete

Scoring Guide

Criteria	Rating	Comments
1. Report documents where information was obtained	3 2 1 0	
2. Report lists the laws and rules pertaining to the case	3 2 1 0	
3. Report includes a summary of the case involving crime, fraud or abuse	3 2 1 0	
4. Report includes a summary of the status or outcome of the case	3 2 1 0	
5. Report is between 2-3 pages long	yes no	
6. Report is word processed	yes no	
7. Report contains correct spelling and grammar	yes no	

Teacher ___________________________ Date ________________

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Directions to Teacher

Allow in-class research time for students to identify a case of computer crime, fraud or abuse. If you know of any cases, you may want to suggest those to your students.

Standard

B.12.16 Practice a code of ethics for information systems

Prompt

Ethical behavior is essential in personal, school and work activities. Consideration needs to be given to honesty, integrity, confidentiality, morality, values, loyalty, and adherence to setting policies. This applies to all aspects of technology use.

Directions

For this activity you are a student member of the District Technology Committee. Along with the rest of the committee you are to devise a Code of Ethics for information systems.

1. In your group, brainstorm a list of at least eight ethical uses/abuses. Record the list on a flip chart.
2. Compare your completed flip chart with The Ten Commandments of Computer Ethics.
3. Prepare a presentation that compares your results and identifies the issues your team did not consider. Include your team recommendation and justification for the District Code of Ethics.

The Ten Commandments of Computer Ethics

1. Thou shalt not use a computer to harm other people.
2. Thou shalt not interfere with other people's computer work.
3. Thou shalt not snoop around in other people's files.
4. Thou shalt not use a computer to steal.
5. Thou shalt not use a computer to bear false witness.
6. Thou shalt not copy or use proprietary software for which you have not paid.
7. Thou shalt not use other people's computer resources without authorization or proper compensation.
8. Thou shalt not use other people's intellectual output.
9. Thou shalt think about the social consequences of the program you are writing or the system you are designing.
10. Thou shalt always use a computer in ways that demonstrate consideration and respect for your fellow humans.

Source: Computer Ethics Institute, Washington, D.C.

Student Name ____________________ Date ______________

Ethics for Information Systems

Scoring Standard

You must achieve a score of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion; minor revision needed
1= Meets some of the criterion; substantial revision needed
0= Does not meet criterion

Scoring Guide

Criteria	Rating	Comments
1. Presentation produces preliminary flip chart of minimum eight uses/abuses	3 2 1 0	
2. Presentation reports on the comparison of team results to the Ten Commandments of Computer Ethics	3 2 1 0	
3. Presentation includes a District Code of Ethics	3 2 1 0	
4. Presentation is logically organized	3 2 1 0	
5. Presentation language is clear and concise	3 2 1 0	
6. Presentation justifies each item in the Code	3 2 1 0	
7. Presentation demonstrates knowledge of ethical behavior	3 2 1 0	
8. Group completes the project within the set time limit	3 2 1 0	

Teacher ________________________ Date ______________

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Directions to Teacher

For this activity, divide students into groups of four or five. Preliminary information may be given in the form of use/abuse examples to speed the process along. Provide the teams with the "Ten Commandments" handout when ready. Be sure to set a time limit for brainstorming, recording, and reporting results.

The Information Technology Industry and Society

Standard

B.12.17 Describe how the information technology industry impacts society

Prompt

Technology in general impacts all aspects of life. Information technology, a relative newcomer, has made swift and far-reaching positive and negative changes in many areas. It is important to understand these changes when making education, career, and personal living choices. Your acceptance/rejection of information technology through purchase decisions, voting, and community activities is powerful.

Directions

This is an exercise to enhance your ability to understand the impact of information technology. To complete this activity, follow the guidelines below:

1. Select a topic from the list provided by your teacher.
2. Select an appropriate medium (speech, panel discussion, skit, commercial, radio program, role play, report, handout, brochure posters, display, etc.) to present the information on your chosen topic.
3. Research your topic and gather information related to your topic from a minimum of three different types of sources (e.g., all information cannot come from three different textbooks). Sources to consider are: textbooks, periodicals, other print material, interviews, surveys, Internet, TV/radio programs, videos, guest speakers, etc.
4. Make sure your project meets the criteria listed on the scoring guide and stays within the time frame identified by your teacher.

Student Name ______________________ Date ________________

The Information Technology Industry and Society

Scoring Standard

You must achieve a score of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Meets criterion; no revision needed
2= Meets most of the criterion; minor revision needed
1= Meets some of the criterion; substantial revision needed
0= Does not meet criterion

Scoring Guide

Criteria	Rating	Comments
1. You select an appropriate medium for presenting the topic	3 2 1 0	
2. Project shows the impact of information technology	3 2 1 0	
3. Project presents data objectively	3 2 1 0	
4. Project includes the appropriate use of jargon and acronyms for the audience	3 2 1 0	
5. Project stays within the given time frame	3 2 1 0	
6. Project is clear, concise, complete, and correct	3 2 1 0	
7. Project is supported by a minimum of three different types of sources	3 2 1 0	

Teacher ____________________________ Date ________________

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Directions to Teacher

Provide students with a list of topics to explore and the mediums you will consider. Meet with each student or group of students and decide on the medium for the topic. You may want to require a print backup on all presentations. For all topics, the positive and negative effects should be given. Some possible topics to consider are listed below.

- Evaluate the relative effect of computers on the environment including their disposal.
- How are computers used in a specific business?
- How are computers used in science?
- How have computers changed communication?
- What roles do computers play in government?
- What effects have computers had on the practice and enforcement of law?
- How have computers affected education?
- Has Microsoft's dominance of the operating system market hindered the computer industry?
- How does technology affect perceptions of places and regions?
- How does technology affect the location of economic activities?
- Compare a system of the present to one of the past (e.g., computers vs. typewriters) in terms of factors such as quality, efficiency, speed, cost, etc.
- Analyze how the introduction of a new development in technology has affected or could affect human activity.
- What effect does technology have on the definition of, access to, and use of resources?
- Identify a current problem facing society (e.g., mass transit, distributing natural resources, conservation, uses of natural resources) and what part technology does/could play.
- Analyze a recent technological innovation and develop an impact statement.
- Propose a technology-based solution to a community/social issue.
- Identify and analyze the stress of technology on the environment, people, or society.
- Analyze benefits, limitations, costs and consequences involved in using technology (e.g., computer-based diagnosis of patients).
- Evaluate ways in which technology has expanded human capacity.
- Describe the effects of technology on the development and change of culture.

- Identify and describe the everyday impact of recent space program developments (e.g., more sophisticated computers, remote sensing, medical imaging).
- Evaluate the impact of emerging technologies on employment, worker skills, and employee satisfaction.
- Compare and contrast the personal benefits and liabilities associated with a technological innovation (e.g., self-driven vehicles, human-implanted identification devices, open access to instant communication).

Develop Fax Usage Training

Standard

B.12.18 Send and receive faxes

Directions

Produce a manual on how to use the fax machine.

1. Identify the task and select the tools needed to complete the project.
2. Write bulleted step-by-step instructions. Both plain fax and computer fax must be covered. Make sure to use clear and complete explanations and descriptions.
3. Create or import illustrations and detailed examples.
4. Include safety and troubleshooting instructions.
5. Assemble the final product choosing language, style, and organization that are clear and understandable to your audience. Use digital keyboarding and page design standards.
6. Use the scoring guide to self-evaluate your work.
7. Field test your manual with another student and revise as needed.
8. Send and receive faxes using the instructions in your manual.

Scenario

Welcome to the Human Resources Department at J & S, Inc. You are a member of the work team responsible for employee training. Your first assignment is to produce a training manual on faxing.

Fax Manual Scoring Guide

Scoring Standard

You must achieve a minimum score of "2" or "yes" on each criterion to demonstrate competence.

Rating Scale

3= Proficient; performs criterion independently and often exceeds expectations, no revision necessary
2= Intermediate; performs criterion at expected level with little assistance, some revision necessary
1= Introductory; performs criterion but needs assistance, much revision necessary
0= Unable to perform criterion

Yes= Criterion is complete

No= Criterion is not complete

Student Name ______________________ Date __________________

Scoring Guide

Criteria	Rating	Comments
1. Manual covers plain fax and computer fax	3 2 1 0	
2. Manual includes bulleted, step-by-step instructions	3 2 1 0	
3. Manual includes clear and complete explanations and descriptions	3 2 1 0	
4. Manual contains illustrations and/or detailed examples	3 2 1 0	
5. Manual includes safety and troubleshooting instructions (e.g., paper jams)	3 2 1 0	
6. Manual language, style, and organization are clear and understandable to the audience	3 2 1 0	
7. Manual follows digital keyboarding and page design standards	3 2 1 0	
8. You send clear, concise faxes that are received in timely manner at correct location	yes no	
9. You receive faxes	yes no	
10. You generate a fax log to check for sent/ received items	yes no	

Teacher ___________________________ Date __________________

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Directions to Teacher

Students will need access to a working fax machine to complete this activity. If desired, students may work in pairs to complete the project. Provide students with sample manuals as reference tools. The sending and receiving of faxes can be simulated in the classroom, performed at the worksite or job shadow experience, or completed between home and school.

Standard

B.12.20 Send and respond to voice mail messages

Directions

For this activity you will send and receive voice mail messages using the directions in the scenario below. Before attempting this activity, become familiar with your equipment and system by reading the manual or observing a teacher demonstration. Although specific instructions vary among systems, knowing how to manage one system makes the transition to another system easier.

Scenario

You are in training for the receptionist position with J & S, Inc. As part of your duties, you will be responsible for sending and receiving voice mail messages, as well as managing other tasks with the voice mail system.

1. Make reservations for Mr. Smith for the Management Development Seminar at Marquette University on June 20 and 21. They have an automated system for registration for the seminar. Leave them a message on their voice mail system enrolling Mr. Smith in the seminar.
2. Perform each of the other tasks listed on the scoring guide.

All forms of communication must be clear, appropriate and useful.

Student Name ____________________ Date ________________

Send and Receive Voice Mail Messages

Scoring Standards

You must achieve a minimum score of "2" on each criterion to demonstrate competence.

Rating Scale

3= Completed task without prompting or restarting
2= Completed task without prompting but had to restart; or completed task with prompting and no restart
1= Completed task with prompting and restarting
0= Did not complete task

Scoring Guide

Criteria	**Rating**	**Comments**
1. You initialize the mailbox by opening the mailbox, changing the default password, and recording your name in the company directory	3 2 1 0	
2. You record a personal mailbox greeting	3 2 1 0	
3. You access messages from within office	3 2 1 0	
4. You listen to new messages	3 2 1 0	
5. You listen to saved messages	3 2 1 0	
6. You replay a message	3 2 1 0	
7. You access a previous message	3 2 1 0	
8. You pause and continue a message	3 2 1 0	
9. You forward a message	3 2 1 0	
10. You compose, record, and edit voice mail messages	3 2 1 0	
11. Voice mail message includes appropriate information	3 2 1 0	

Teacher ______________________________ Date ________________

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Directions to Teacher

To conduct this activity you will need access to a voice mail system. Some students may be able to complete the activity at their job sites. It may also be possible for students to work with the receptionist at your school. As an alternative, set up a simulated situation and have students use peer activity.

Sort and File Electronic Documents

Standard

B.12.21 Sort and file documents according to established procedures

Directions

For this activity you will be asked to sort and file documents. In order to accomplish this you will need to create folders and organize the desktop by creating, opening, copying, moving, transferring, finding, and deleting files from floppy disks that your teacher will provide to you.

Scenario

Welcome to your new position in the Business Department at Wisconsin High as a teacher assistant. The person who held your position previously was not well organized, did not use efficient file management techniques or practices, and left things a mess. She left you several floppies with different files on them, none of which seem to relate to each other. Your assignment is to "clean up" the hard drive and desktop by taking the files from the floppies, and logically organizing them into folders with titles that make sense.

Student Name ______________________ Date __________________

Sort and File Documents

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Completed task without prompting or restarting
2= Completed task without prompting but had to restart; or completed task with prompting and no restart
1= Completed task with prompting and restarting
0= Did not complete task

Scoring Guide

Criteria	Rating	Comments
1. You create and name the new folders	3 2 1 0	
2. You move files into folders	3 2 1 0	
3. You delete unnecessary files/folders	3 2 1 0	
4. You rename files/folders to organize the files	3 2 1 0	
5. Filing system is organized and makes sense	3 2 1 0	

Teacher ___________________________ Date __________________

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Directions to Teacher

Use the information below to create disks with unorganized files (note: file names are listed, but there is not accompanying text for each file; i.e., they are "empty" files). The file names should be sufficiently self-explanatory to enable students to appropriately organize them. Suggested folders are: Field Trips, Exams and Quizzes, Homework Assignments, Student Progress Reports, Meeting Notes, Wish/Supply List, Student Grades/Grade Book.

Disk #1
Field Trip to General Motors (12/4/99)
Quiz 4 – HTML
Homework handout – computer ethics
Needed supplies for comp. Lab
Grade book – Intro. To Comp. Programming
Progress Reports – all classes

Disk #2
Notes on Dpt. Meeting 9/16/99
Progress reports for Adv. Prog. Class – 10:00 am
Field Trip Consent Form
Grade book – 2nd hr. (Intro. Class)
Quiz 2 – Electronic messaging

Disk #3
List- Software Upgrades for LabB
Homework assignment – Power Point
Grade book – 2nd hr. (Intro. Class)
Grade book – 4th hr. (Honors Class)
Notes on end-of-year District-wide meeting (6/7/99)

Disk #4
Students Paid for Field Trip to Chicago
Notes on Dpt. Mtg. 5/2/99
Quiz 1 – Computer Terminology
Homework Handout – Computer Terminology
Upgrades needed for LabA
Final Exam – Adv. Prog.
Progress Reports for 2nd hr.

Business Standards C

Financial Procedures

CONTENT STANDARD

Students in Wisconsin will use financial procedures to make decisions about planning, organizing, and allocating resources.

Rationale: Making wise decisions is essential for the economic well being of our country. Students need financial knowledge to ensure they make the best decisions both personally and professionally. Whether it is daily transactions or investments for their future, students must understand how to use resources to develop economic growth.

PERFORMANCE STANDARDS

C.12.1 Calculate simple interest on loans

C.12.2 Maintain and reconcile a checking account

C.12.3 Prepare a budget of personal income and expenses

C.12.4 Explain the use of credit cards, bank cards, debit cards, credit ratings, and loan applications

C.12.5 Construct and read charts, tables, and graphs that summarize data from real world situations

C.12.7 Contrast rental, lease, or purchase options of property

C.12.8 Prepare a simple income tax form

C.12.9 Contrast short and long-term investment options

Calculate Simple Interest

Standards

C.12.1 Calculate simple interest on loans (see M D.12.3)

C.12.6 Use calculators appropriately to aid computations and understanding (see M B.4.5)

Directions

For the following scenario, calculate the amount of simple interest and the total to be repaid during the life of the loan using the information for each financial institution. To determine the amount of interest and the total to be repaid, use a calculator. Record your calculations on the Interest Calculation worksheet. Finally, determine which scenario is best for you, the consumer, based on cost and record it on the worksheet.

Scenario

You are in the market for a used car. After looking at your budget, you have determined that the maximum you can spend for a used car is $10,000. You are planning on repaying this loan over a period of three or four years. You are shopping around for the best loans available to you by going to local financial institutions. The three financial institutions in your area have different interest rates and repayment periods. Determine which of the three financial institutions can provide you with the best deal based on cost by using the information that follows:

MAIN STREET BANK
Simple interest rate of 7%
Repayment period of four years

YOUR SAVINGS BANK
Simple interest rate of 6-3/4%
Repayment period of three years

ALPHA CREDIT UNION
Simple interest rate of 7-1/4%
Repayment period of four years

Interest Calculation

Directions: Using the information provided in this activity, complete this worksheet.

Financial Institution	Interest Rate	Length of Loan	Total Amount of Interest	Total Amount to be Repaid

Which financial institution will provide the best loan based on cost?

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Student Name ______________________ Date ________________

Calculate Simple Interest Scoring Guide

Scoring Standard

You must achieve a "yes" rating on each criterion to demonstrate competence.

Rating Scale

Yes= Completed the item accurately and completely.
No= Did not complete the item accurately or the work is incomplete.

Scoring Guide

Criteria	**Rating**	**Comments**
1. You identify the interest rate for the loan from each financial institution	Yes No	
2. You identify the length of time for the loan from each financial institution	Yes No	
3. You use the correct formula (Interest = PxRxT, where P is principal, R is interest rate, and T is time) to determine the amount of simple interest on the loan from each financial institution	Yes No	
4. You determine the total amount to be repaid during the life of the loan for each financial institution; principal plus interest	Yes No	
5. You determine which financial institution provides the best loan to the consumer based on cost	Yes No	

Teacher ____________________________ Date ________________

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Directions to Teacher

Review the directions, scoring guide, and worksheet with students. The answers are as follows:

FORMULAS:
Interest = Principal x Rate x Time
Total to be Repaid = Principal + Interest

1. Main Street Bank
   Interest=$2,800
   Total repayment=$12,800
2. Your Savings Bank
   Interest=$2,025
   Total repayment = $12,025
3. Alpha Credit Union
   Interest = $2,900
   Total repayment: $12,900

THE BEST CHOICE is Your Savings Bank

Maintain a Checking Account

Standards

C.12.2 Maintain and reconcile a checking account

C.12.6 Use calculators appropriately to aid computations and understanding (see M B.4.5)

Directions

In this activity you will do the necessary research in preparing to open a checking account and then maintain and reconcile a sample account.

Part I

1. Contact a local bank and identify two of their checking account options.
2. Compare the two options and present the following information for each option in a chart:
   a. service charges
   b. number of checks that can be written each month
   c. options for check printing
   d. interest bearing options
   e. advantages and limitations of each checking plans.

Part II

For this part of the assessment, your instructor will provide you with checks and a check register showing checks written in the previous month.

1. Open an account, write the checks as directed, and record your checks in the check register.
2. You will be provided bank statements showing checks and deposits processed in the previous month. Using a reconciliation form provided, determine if the balance in your check register agrees with the bank statement balance. Use a calculator to aid you in your computations and to verify accuracy.

Student Name ______________________ Date ___________________

Maintain a Checking Account

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Work is of highest quality, answers are correct
1= Work is complete and most answers are correct
0= Work is incomplete or incorrect

Scoring Guide

Criteria	**Rating**	**Comments**
1. You create a chart that identifies two options for checking account plans from a local bank including service charges, number of checks that can be written each month, options for check printing, interest bearing options and advantages and limitations of these checking plans	2 1 0	
2. You write out checks properly	2 1 0	
3. You record checks in check register and calculate correct balance	2 1 0	
4. You reconcile the checking account with bank statement balance	2 1 0	

Teacher ____________________________ Date ___________________

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Directions to Teacher

Internal Training Services (ITS) has educational materials called YOUR CHECKING ACCOUNT, which includes an introductory text, a supply of checks, a check register, and set of bank statements. After learning how to open an account, keep records and reconcile the monthly statement, students actually maintain their own accounts for a simulated 8-month period. Other banking services such as wire transfers, pre-authorized payments, certified checks and the use of ATM's are incorporated throughout the program. A post-test and Teacher's Manual including originals suitable for reproduction are also provided. ITS intends to provide this practice set to businesses for purchase with the idea that the businesses provide them to the schools free of charge. Contact your local banks to determine how you may acquire these materials. Internal Training Services is located at 333 West State Street, Media, PA 19063; (610) 566-7408.

Standard

C.12.3 Prepare a budget of personal income and expenses

Directions

You have just graduated from college, moved to the city of your dreams, and have been hired for the job you have been preparing for since high school! You are making $25,000 a year. Your task is to develop a monthly budget to help you meet your expenses and save for the future.

1. Design a personal budget spreadsheet that includes your gross yearly income, gross monthly income, amount of taxes you will pay, and net monthly income, calculates your total monthly expenses and figures the amount of discretionary income--fun money--you will have left at the end of each month. For monthly expenses be sure to include the following:
    - Housing (mortgage or rent)
    - Automobile (monthly payment if you will have one and gas)
    - Credit card and debt repayment (in addition to any other credit card debt you owe, you have a student loan repayment of $75.00 per month)
    - Utilities (water, electric, gas garbage, etc.)
    - Telephone (if you have a cellular phone or pager figure the monthly cost of that as well)
    - Clothing
    - Food
    - Household furnishings
    - Healthcare insurance, doctor and dentist visits, prescription drugs
    - Auto insurance
    - Auto maintenance
    - Savings/IRA/Retirement
    - Miscellaneous Expenditures
    - Entertainment (movies, eating out, recreational expense)
    - Alcohol and tobacco use

    You will need to do some research to determine your basic living expenses. Use newspapers to determine housing/rent, automobile expenses. Talk with your parents or other adults about basic living expenses. Your teacher may provide ball park numbers for some of the categories. For the purposes of this example you may not live at home with your parents. Record the expenses on your spreadsheet without trying to consciously "balance" the budget at this point. Print your spreadsheet.

2. Evaluate your completed budget to decide if you can afford your style of living and determine what items you could change. Revise your budget on the spreadsheet. On a separate sheet of paper, note the specific changes you will make to balance your budget (live with a roommate, drive an older car, dispose of your pager, etc.). Print your revised budget.
3. Submit copies of your initial budget, revised budget, and written analysis of your budget (noting changes you made to balance the budget) to your teacher for evaluation.

Student Name ______________________ Date ________________

Personal Budget

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely.

Scoring Guide

Criteria	**Rating**	**Comments**
1. Budgets include housing expense	S U	
2. Budgets include automobile expense (including auto insurance and maintenance)	S U	
3. Budgets include debt repayment expense	S U	
4. Budgets include utility expenses	S U	
5. Budgets include telephone expenses	S U	
6. Budgets include clothing expenses	S U	
7. Budgets include food expenses	S U	
8. Budgets include household furnishings	S U	
9. Budget includes healthcare expenses	S U	
10. Budget includes savings/IRA/retirement	S U	
11. Budget includes recreation expenses	S U	
12. Second budget is balanced	S U	
13. Second budget is realistic	S U	
14. Written summary documents changes necessary to balance the budget	S U	
15. Work is professionally presented	S U	

Teacher ___________________________ Date ________________

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Directions to Teacher

1. Students will need to use spreadsheet software to complete this activity. If you do not have access to the software (or learners do not know how to use it) the project can be completed with pencil/paper and a calculator. Revise the directions as necessary if you will not be using the spreadsheets.
2. Review the directions and scoring guide with students. Assist students in locating appropriate figures for monthly expenses. You might divide learners into groups to do research over the phone or using newspapers or Internet resources. Post the group findings on the board or create a handout with the expense options. (For example, one group might research (using a newspaper) actual rental options for your town or city. They would also determine the utility expenses (if any) for the options. Another group might research long distance carrier options for telephone expenses. Another group could research 3 healthcare options. Etc.)
3. After the initial budgets are completed, discuss ways to balance them.

Standard

C.12.4 Explain the use of credit cards, bank cards, debit cards, credit ratings, and loan applications

Directions

For this activity you will explore the world of credit.

1. Your teacher will divide you into small groups or pairs. As a group, research the information on the Credit: Buy Now Pay Later activity sheet. Use the Internet, your textbooks, brochures and pamphlets from local banks, etc., to find your answers.
2. On your own write a one- to two-page report on credit using the information you gathered on your activity sheet. Incorporate the following in your report:
   - Explain uses and terms of debit cards, credit cards and bank cards
   - Differentiate between national credit card companies and department store credit cards
   - Explain how credit ratings are established for individuals and how they are used by banks and businesses granting credit
   - Explain the information needed in filling out a loan application correctly
   - Explain the considerations made by loan officers in determining approval of a loan application
   - Differentiate between borrowing money from local banks versus finance companies

   Your report must be word processed, 1-2 pages, double-spaced
3. Submit your report along with the scoring guide to your teacher for evaluation. Make sure your report meets all of the requirements on the scoring guide.

Credit: Buy Now, Pay Later

Directions: Answer the following questions to help you prepare for your Credit Paper.

1. Compare an actual example of a credit card, bank card and debit card using the following chart.

Name of the Card	Uses	APR	Annual Fee	Special Benefits
Credit Card:				
Bank Card:				
Debit Card:				

2. What is the difference between national credit cards and department store credit cards?

3. How are credit ratings established for individuals?

4. How are credit ratings used by banks and businesses in granting credit?

5. What information is typically required on a loan application?

6. How do loan officers determine if they will approve a loan application?

7. What is the difference between borrowing money from a local bank versus a finance company?

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Student Name ____________________ Date ________________

Credit: Buy Now, Pay Later

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Work is of the highest quality, information is accurate and correct
1= Work meets minimum standards, some information may be missing
0= Work does not meet the minimum standards

Scoring Guide

Criteria	**Rating**	**Comments**
1. Report includes an explanation of the uses and terms of debit cards, credit cards and bank cards	2 1 0	
2. Report includes the difference between national credit card companies and department store credit cards	2 1 0	
3. Report includes an explanation of how credit ratings are established for individuals and how they are used by banks and businesses in granting credit	2 1 0	
4. Report includes an explanation of the considerations made by loan officers in determining approval of a loan application	2 1 0	
5. Report includes an explanation of the difference between borrowing money from local banks versus finance companies	2 1 0	
6. Report is word-processed, double-spaced	2 1 0	
7. Report is professionally presented (spelling, grammar, mechanics)	2 1 0	

Teacher ____________________ Date ________________

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Directions to Teacher

1. Before assigning the project, assemble materials on credit. Check with local banks and financial institutions for information regarding credit, bank cards, loans, etc. In addition, you may be able to obtain pamphlets and printed information from the major credit card companies (i.e., MasterCard) or Federal Trade Commission/Bureau of Consumer Protections/Office of Consumer & Business Education (202) 326-3650. Before assigning this project, you might ask a local banker or loan officer to speak to the class regarding the loan application and approval process.
2. Divide students into small groups or pairs to do the initial research. Make sure each student has a copy of the Credit: Buy Now, Pay Later activity sheet. Allow time for research.
3. Review the directions and scoring guide for the project.

Directions to Teacher

1. Lead a discussion over the differences between renting, leasing and purchasing property. If possible, obtain sample legal documents to enhance your discussion.
2. Determine whether the student will complete the assignment alone or in pairs. Hand out copies of the directions and the Rent, Lease or Buy activity sheet. Review the directions and scoring guide. You may want to revise the scenarios to fit the kind of information you want learners to research. Review the factors on the Rent, Lease or Buy activity sheet. Make revisions or additions.
3. Allow time for students to research information. Make publications, newspapers, or the Internet available to students.

Student Name ____________________ Date ________________

Rent, Lease, or Purchase

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Exceeds expectations; work is of the highest quality
1= Meets expectations; some items may need additional work or redesign
0= Does not meet expectations; major components are missing, incorrect or incomplete

Scoring Guide

Criteria	**Rating**	**Comments**
1. You identify properties that can be rented, leased and purchased	2 1 0	
2. You explain the terms for the rental, lease, and purchase options	2 1 0	
3. You identify advantages of the rental, lease, and purchase options	2 1 0	
4. You identify the disadvantages of the rental, lease, and purchase options	2 1 0	
5. You identify situations in which rental, leasing, and purchasing are the most logical option	2 1 0	
6. You determine whether the people in your scenario should rent, lease, or purchase and defend your choice	2 1 0	
7. Your work is completed neatly and turned in on time	2 1 0	

Teacher ________________________ Date ________________

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Questions

1. In what situation is **renting** the best choice?

2. In what situation is **leasing** the best choice?

3. In what situation is **purchasing** the best choice?

4. Which scenario did you choose?

5. What is the best option for your scenario and why?

Rent, Lease or Purchase

Directions: Use this sheet to compare the options of rent, lease, or purchase. Your teacher may add additional factors for you to research.

Factors	**Rent**	**Lease**	**Purchase**
Property Description			
Terms			
Fees			
Monthly Payment			
Advantages of the Option			
Disadvantages of the Option			

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Rent, Lease, or Purchase

Standard

C.12.7 Contrast rental, lease, or purchase options of property

Directions

For this activity you will determine the best choice for a series of scenarios: rent, lease or purchase. You will work alone or with a partner to complete this activity.

1. Review the directions, scoring guide, and the Rent, Lease or Purchase activity sheet.
2. Read through the scenarios. Choose one scenario to research. Research advertisements in the newspaper or on the Internet for rental property, lease property and purchase options to meet the needs in the scenario. Cut out or copy your findings.
3. Complete the Rent, Lease or Purchase activity sheet. You may need to contact the person (agency) in the advertisement to gain some of the information. Review the rental, lease and purchase agreements provided by your teacher.
4. Submit your activity sheet and scoring guide to your teacher for evaluation.

Scenarios

1. John is moving away from home to attend a 2-year college. There isn't any housing on campus.
2. Betty is moving to a new locatión for a six-month internship while she is in college.
3. Tom and Ann are starting a new restaurant business. They want a nice location, but their resources are limited.
4. Fred needs to expand his manufacturing business. He has been in business for 10 years already. He's been leasing part of a building. He can't get more space where he is presently located, so he needs to move.
5. Jane and Brian have been married for 5 years. They are both working full-time (combined income is approximately $60,000 dollars). They are expecting their first child. The lease on their apartment runs out the end of next month. They need to move.

Directions to Teacher

1. Review the directions and scoring guide.
2. Direct students to use as much of the $100,000 as possible in purchasing their stocks.
3. To make this a contest, you could award a prize to the student whose portfolio value increased the most during the two weeks.

Student Name ______________________ Date ________________

Invest It

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Exceeds expectations; work is of the highest quality
1= Meets expectations; some parts may need additional work or redesign
0= Does not meet expectations; major components are missing, incorrect or incomplete

Scoring Guide

Criteria	**Rating**	**Comments**
1. You explain your stock choices and rationale in an oral report	2 1 0	
2. You share the results of the individual stock choices	2 1 0	
3. You explain any major fluctuations that occurred in your stock choices	2 1 0	
4. You create a line chart and a pie chart and explain them during your presentation	2 1 0	
5. The line chart includes the x- and y- axis labels	2 1 0	
6. The line chart accurately depicts the trend for each stock during the two-week period	2 1 0	
7. The line chart is easily readable	2 1 0	
8. The pie chart includes a legend explaining the data	2 1 0	
9. The pie chart shows the value of each stock and the remaining cash balance	2 1 0	
10. The pie chart is easily readable	2 1 0	
11. You identify the final portfolio value and any gain or loss	2 1 0	

Teacher ______________________ Date ________________

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Standard

C.12.5 Construct and read charts, tables, and graphs that summarize data from real world situations (see M F.12.2)

Prompt

You have just inherited $100,000 from your rich Aunt Suzie! After much thought and contemplation, you have decided to invest in the stock market.

Directions

1. Use any available resources, newspapers, the Internet, corporate annual reports, etc., to research the companies you would like to invest in. You must "diversify" and invest in a minimum of three different companies. Determine how many shares of each company stock you'd like to purchase, being sure to use as much of your inheritance as possible.
2. Using the Internet or the newspaper, track your stock prices for a two-week period. Record your stock prices day by day on a spreadsheet or piece of paper.
3. At the end of the two-week period, create the following visuals:
    - A line chart showing the trend for each stock you purchased. You may use a spreadsheet software or paper, pencils, pens and markers.
    - A pie chart showing each stock and any remaining cash balance (in other words your entire portfolio). You may use spreadsheet software or paper, pencils, pens, and markers.
4. Give an oral report to the class on the following:
    - The stocks you purchased and why
    - The results of your individual stosck performances
    - Any major fluctuations that occurred and the reason for the fluctuations
    - Your final portfolio value and any gain or loss during the period

    Use your two visual aids in your presentation.

Standard

C.12.8 Prepare a simple income tax form

Directions

1. Complete a Federal Form 1040A accurately, completely, and legibly using the information provided in the scenario below. Your instructor may provide you with forms, directions and information necessary, or direct you to the Internal Revenue Service website (www.irs.ustreas.gov) where you can download the necessary tax forms and information.
2. List the supporting documents you would need to send with your tax form.
3. List the correct street address and/or on-line address to mail your tax forms and supporting documents.
4. Submit your completed 1040A, list of supporting documents, mailing information and scoring guide to your instructor for evaluation.

Scenario

You are Eric H. Richards. You are 16 years old, single, and have good eyesight. You worked as a clerk and earned a total of $3,200 as reported on the Form W-2. You can be claimed as a dependent on your parents' return. You want to contribute $3 to the Presidential Election Campaign Fund.

Eric H. Richards
514 Tenth Street, Bryan, KY 54612
Social Security No. 059-00-3212
Amount of federal tax withheld and reported on Form W-2: $145
Interest income from Bryan National Bank reported on Form 1099-INT: $900

Student Name ______________________ Date ________________

Tax Time

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Met the criterion accurately and completely
No= Did not meet the criterion; work is inaccurate or incomplete

Scoring Guide

Criteria	**Rating**	**Comments**
1. You determine the correct filing status	yes no	
2. You calculate gross income, adjusted gross income and taxable income	yes no	
3. You locate the correct tax amount from the tax table found in the directions or on-line	yes no	
4. You determine any refund or amount owed	yes no	
5. You complete the tax form legibly	yes no	
6. You sign the tax form	yes no	
7. You identify all of the supporting documents needed	yes no	
8. You identify the correct mailing address for submitting the form	yes no	

Teacher ___________________________ Date ________________

Directions to Teacher

Direct students to complete all parts of the tax form, including the signature. Provide students with access to instructions as necessary either in paper form or on-line.

This project was taken from the 1998 Understanding Taxes Teacher's Resource Kit. It is available free to educators. The address for educators in Wisconsin is:
310 W. Wisconsin Avenue
Stop 6712 MIL
Milwaukee, WI 53203-2221
Phone: (414)297-3302
Toll Free: 1(800)829-1040

Contrast Short- and Long-Term Investment Options

Standard

C.12.9 Contrast short- and long-term investment options

Directions

For this activity you will decide what short- or long-term investment options you would suggest in the scenarios listed below. Record your suggestions on the Short- and Long-Term Investments activity sheet. Use the six investment criteria: safety, high liquidity, high return, growth, reasonable purchase price, and tax benefits.

Scenario

1. Your friend Amanda is a junior in high school. She is planning on going away to college after she graduates, but doesn't have much money set aside for tuition and other expenses. She received $1,000 from her aunt as a gift. She is asking for your advice about what to do with this money. What do you recommend?
2. Paul would like to invest $10,000 that he inherited from his grandparents. He would like to have the money for his daughter's college education starting in seven years. He does not like to take a lot of risks because he cannot afford to lose the money.
3. You are able to save $50 each month. Describe the goal you are working toward. Describe how you would invest this money in order to reach your goal.

Short- and Long-Term Investments

Directions: Recommend a short- or long- term investment for each of the scenarios listed below:

1. Your friend Amanda is a junior in high school. She is planning on going away to college after she graduates, but doesn't have much money set aside for tuition and other expenses. She received $1,000 from her aunt as a gift. She is asking for your advice about what to do with this money.

   a. What kind of investment do you recommend, short-term or long-term?

   b. What investment criteria did you use to make your decision?

2. Paul would like to invest $10,000 that he inherited from his grandparents. He would like to have the money for his daughter's college education starting in seven years. He does not like to take a lot of risks because he cannot afford to lose the money.

   a. What kind of investment do you recommend, short-term or long-term?

   b. What investment criteria did you use to make your decision?

3. You are able to save $50 each month. Describe the goal you are working toward and how you would invest this money in order to reach your goal.

Student Name ______________________ Date __________________

Contrast Short and Long-term Investment Options

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Exceeds expectations; work is of the highest quality
1= Meets expectations; some areas may need additional work
0= Does not meet expectations; major areas are incomplete or incorrect

Scoring Guide

Criteria	**Rating**	**Comments**
1. You determine which investment choice you think is best for each scenario	2 1 0	
2. You use the six investment criteria as a basis for making the decision	2 1 0	
3. You explain your decisions and the rationale behind them	2 1 0	
4. You describe an investment strategy for yourself	2 1 0	
5. Your work is completed neatly	2 1 0	
6. Punctuation, spelling, and grammar are correct	2 1 0	

Teacher ____________________________ Date __________________

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Directions to Teacher

None.

Business Standards D

Economics

CONTENT STANDARD

Students in Wisconsin will use critical-thinking skills to function as citizens who are literate about economics through development of personal consumer economic skills and a knowledge of societal and governmental responsibility.

Rationale: The American economy is based on a private enterprise system in which the sum total of the millions of individual choices made by consumers, workers, and citizens affect the decisions made by business owners and government officials. In order to make these informed decisions, individuals must clearly understand how the system operates while comprehending their role in the system.

PERFORMANCE STANDARDS

D.12.1 Describe the components of economic activity and illustrate how they interact with each other

D.12.2 Describe possible effects of the national debt on the level of economic activity in the long run

D.12.3 Explain how consumer legislation may affect consumer product prices

D.12.4 Demonstrate an understanding of current local, state, national, and international economic issues

D.12.5 Describe the roles of business enterprises, consumers, and government in our mixed economy

D.12.6 Explain how interest rates area determined by market forces and how they influence the amount of borrowing and saving by business investors, consumers, and government officials

Standard

D.12.1 Describe the components of economic activity and illustrate how they interact with each other

Directions

There are two parts required for this activity. First, prepare a supply and demand schedule illustrating the supply and demand for fresh-baked cookies at Superb High School during a given period of time. The information necessary to prepare the schedule is provided below:

At $.20, suppliers provide 100 and students demand 400.
At $.30, suppliers provide 150 and students demand 350.
At $.40, suppliers provide 200 and students demand 300.
At $.50, suppliers provide 250 and students demand 250.
At $.60, suppliers provide 300 and students demand 200.
At $.70, suppliers provide 350 and students demand 150.

Then, prepare a word processed essay explaining the following:

1. What the schedule is illustrating.
2. What happens to quantity demanded as price increases and decreases.
3. What happens to quantity supplied as price increases and decreases.
4. The equilibrium market price at which supply and demand equal.
5. At what prices shortages and surpluses of fresh-baked cookies will occur.
6. Other factors that will affect the supply and demand of fresh-baked cookies.

Supply and Demand

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Covered the criterion accurately and completely
No= Did not cover the criterion accurately and completely

Student Name ______________________ Date ___________________

Scoring Guide

Criteria	**Rating**	**Comments**
1. Schedule illustrates suppy and demand for fresh-baked cookies at Superb High School	yes no	
2. Schedule is compiled using table format within any chosen computer software application	yes no	
3. Schedule is printed and submitted to instructor for evaluation	yes no	
4. Essay contains/addresses supply and demand information pertaining to Superb High School	yes no	
5. Essay accompanies printed schedule of the Superb High School's fresh baked cookie supply and demand data	yes no	
6. Essay explains what happens to quantity demanded as price increases and decreases	yes no	
7. Essay explains what happens to quantity supplied as price increases and decreases	yes no	
8. Essay explains the equilibrium market price at which supply and demand are equal	yes no	
9. Essay explains how shortages and surpluses of goods will occur at given prices	yes no	
10. Essay explains other factors that will affect the supply and demand of goods	yes no	
11. Essay is word-processed with correct grammar, punctuation and spelling	yes no	

Teacher ______________________________ Date ___________________

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Directions to Teacher

Be prepared to provide graph paper for the students to prepare the supply and demand schedule.

As a class, discuss how shortages and surpluses occur in supply and how factors other than price affect supply and demand (i.e., seasons, demographics, promotion, etc.).

Standard

D.12.2 Describe possible effects of the national debt on the level of economic activity in the long run (see SS D.8.6)

Directions

In this activity, you will be a member of a debate team. Your subject for the debate will be either FOR or AGAINST balancing the national debt. With your team, research reasons FOR or AGAINST balancing the national debt by using books, magazine articles, the Internet, etc., as resources. On the date specified by your teacher you will carry on a debate with another team. Your role will be to influence the group of students, faculty, parents, and/or community members (judges) in favor of your group's point of view. You will be evaluated according to the completeness of the argument you pose for your viewpoint, as well as your participation on the debate team. Your instructor will present some questions that will be asked during the debate. All team members must be included in the debate and a visual aid must be incorporated. See the scoring guide for how your debate team will be evaluated by both the teacher and the group of judges, and how you will be evaluated by your team members.

Prompt

As a member of a debate team it is your job to assign roles to your teammates in order to assure that everyone is taking part in the research, visual aid construction, and the debate itself. Some suggested roles include: Team Leader, Recorder, Visual Aid Committee Member, Research Committee Member.

Some of the questions you will be presented with during the debate are listed below. The time limit for your team's portion of the debate will be fifteen minutes.

Sample Questions:

1. What is your stand regarding the national debt?
2. Explain the history of how the national debt has grown.
3. Give at least two reasons for your viewpoint.
4. What is the affect this stand could possibly have on individuals? Taxes? Interest rates?
5. What is the affect this stand could possibly have on the economy overall? Interest rates? Inflation?

Student Name ______________________ Date _________________

Debate Evaluation by Instructors and Judges

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Completed the criterion accurately and completely

No= Did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. All team members have a role to play during the debate	yes no	
2. The team uses a visual aid to present their argument	yes no	
3. The visual aid is easy to read by members of the judging panel	yes no	
4. The team presents at least two reasons for their point of view	yes no	
5. The team backs up their two reasons with supporting data and resources used	yes no	
6. The team appear to be prepared	yes no	
7. The team answers all of the questions posed to them	yes no	
8. The team appears confident with their responses	yes no	
9. The team's argument is convincing	yes no	
10. The team stayed within the fifteen-minute time limit	yes no	

Teacher __________________________ Date _________________

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Team Member's Name ______________________________ Date __________

Debate Team Member Evaluation

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Completed the criterion accurately and completely

No= Did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. This person plays an active part in gathering data	yes no	
2. This person plays an active part in preparing for and rehearsing the debate	yes no	
3. This person plays an active part in preparing the visual aid	yes no	
4. This person provides good feedback/constructive criticism to the group	yes no	
5. This person supports decisions that were made by the team	yes no	

Your Name ________________________ Date ________________

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Directions to Teacher

Break the class into two groups. One group will research reasons for balancing the national debt, the other will research reasons for not balancing the national debt. Provide the students with access to the Internet, the library, or any other relevant resources that will help them support their viewpoint. On the date you specify, bring in a group of students, faculty, parents and/or community members and prepare them to be the judges by providing them with a scoring guide (a sample is provided). Assign someone the role of being timekeeper to make sure that each team does not go over its fifteen-minute time limit.

As the instructor, you will need to compile a list of questions to be asked of each team. Questions should be relevant to the current economic situation and national debt statistics.

Legislation's Effect on Consumer Product Prices

Standard

D.12.3 Explain how consumer legislation may affect consumer product prices (see SS D.12.5)

Directions

For this activity, you will be required to research the 1994 Child Safety Protection Act and the consequences of this act on consumer product prices. Using any available resources such as the Internet, magazines, legal briefs, etc., research the history of this legislation, explain the significance this legislation has had on consumer choices and the effect it has had on consumer product prices. In addition, describe your reaction to the legislation. Is it something you are for or against? Why? Be sure that your research paper incorporates the following:

1. Initiative for this legislation
2. History of the legislation (who proposed it and why)
3. What effects this legislation has had on consumer decision-making and market choices
4. Affect the legislation has had on consumer product prices

Your paper is required to be word processed, between 3-5 pages, using a font size no larger than 12, and line spacing no larger than double spaced. In addition, include a bibliography citing a minimum of five sources. The title page must include your name, course name, title of your research paper, and the current date.

Student Name ______________________ Date ________________

Legislation's Effect on Consumer Product Prices

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Completed the criterion accurately and completely

No= Did not cover the criterion accurately and completely

Scoring Guide

Criteria	**Rating**	**Comments**
1. Research paper is word processed	yes no	
2. Research paper is the specified length	yes no	
3. Research paper uses a font size no larger than 12 and line spacing no larger than double	yes no	
4. Research paper includes a title page meeting the requirements	yes no	
5. Research paper includes a bibliography page with a minimum of five sources	yes no	
6. Research paper uses correct format for citing the resources	yes no	
7. Research paper explains the initiative for this legislation	yes no	
8. Research paper explains the history of this legislation including who proposed it and why	yes no	
9. Research paper explains what effects this legislation has had on consumer decision-making and market choices	yes no	
10. Research paper explains what effects this legislation has had on consumer product prices	yes no	
11. Research paper states position either for or against this legislation	yes no	
12. Research paper explains position either for or against this legislation	yes no	

Teacher ____________________________ Date ________________

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Directions to Teacher

None.

Report on Economic Issues

Standard

D.12.4 Demonstrate an understanding of current local, state, national, and international economic issues (see SS D.12.6, D.12.13)

Directions

For this activity you will read or listen to current news for a period of four weeks from one of the following mediums:

- newspapers
- magazines (either hard copies or on the Web)
- news radio
- local/national TV news broadcasts

Covering a four-week period, you will prepare two typed reports of one-half to one-page in length each week, for a total of eight (8) short papers. Of the eight reports at least one report will cover economic issues for each of the following: local, state, national and international.

Each paper will include the following:

1. Date of news story
2. Source of information (give name of publication or broadcast)
3. Level of news/issues: local, state, national, or international
4. One to two paragraphs summarizing news/issues
5. One paragraph summarizing effect/impact these issues have on the local, state, national, or international economy.

Your eight reports should be word processed with correct grammar, spelling, and punctuation.

Student Name ______________________ Date __________________

Report on Economic Issues

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Completed the criterion accurately and completely

No= Did not cover the criterion accurately and completely

Scoring Guide

Criteria	**Rating**	**Comments**
1. You submit 8 reports (two/week for four weeks) to your teacher for evaluation	yes no	
2. At least one report pertaining to each local, state, national and international news is included as part of the eight reports	yes no	
3. Reports indicate the dates of the news story	yes no	
4. Reports denote source of the information	yes no	
5. Reports identify the level of news/issues	yes no	
6. Reports summarize the news in one to two paragraphs	yes no	
7. Reports explain how the current news/issues affect the corresponding local, state, national, or international economy	yes no	
8. Reports are word processed	yes no	
9. Reports contain correct spelling, grammar and punctuation	yes no	

Teacher ___________________________ Date __________________

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Directions to Teacher

The reports may be turned in weekly or as a completed project at the end of the four weeks. If all are turned in as a completed project after four weeks, be sure the learner has two reports dated each week to indicate that they observed news items each week on an on-going basis.

Standard

D.12.5 Describe the roles of business enterprises, consumers, and government in our mixed economy (see SS D.8.10, D.12.7, D.12.14)

Directions

For this activity you will:

1. Choose a local business owner/operator to interview.
2. Develop questions to ask him/her regarding the roles of businesses, consumers, and government in our economy.
3. Upon contacting the owner/operator, introduce yourself and your purpose in calling. Ask for the owner's willingness to provide you with some information you are seeking for a class project.
4. Upon completion of your interview, thank the owner for his/her cooperation.
5. Prepare a one-page, word processed report summarizing your interview and including the following:
    a. name of person interviewed and his/her business affiliation
    b. date of interview and procedure (i.e., telephone, personal interview, etc.)
    c. questions asked in the interview
    d. owner's/operator's perspective of decisions to be made and roles of business enterprises, consumers, and government.
6. You will orally present a 2-3 minute summary of your interview using your report as a guideline for presentation.

Student Name ______________________ Date ________________

Roles in our Mixed Economy

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely
U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. Report includes date of interview and process of interview	S U	
2. Report includes name of business owner/ operator interviewed	S U	
3. Report includes questions asked in interview	S U	
4. Report includes description of owner's/operator's perspective of the decisions to be made and the role of business enterprises in our mixed economy	S U	
5. Report includes a description of owner's/operator's perspective of the decisions to be made and the role of consumers in our mixed economy	S U	
6. Report includes a description of owner's/operator's perspective of the role of the government in our mixed economy	S U	
7. Oral presentation is 2-3 minutes	S U	
8. Oral presentation includes name of owner/ operator interviewed	S U	
9. Oral presentation includes summary of owner's/ operator's perspective of roles of business enterprises, consumers, and government in our mixed economy	S U	

Teacher ____________________________ Date ________________

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Directions to Teacher

The learner should indicate the name of the business owner or operator he/she is planning to interview before making the contact. The evaluator can then determine that each learner will be contacting a different business owner/operator.

Compare/contrast findings after the oral presentations to broaden students' understanding of the roles of business, consumers, and government in our mixed economy.

Describe Interest Rate Influences

Standard

D.12.6 Explain how interest rates are determined by market forces and how they influence the amount of borrowing and saving by business investors, consumers, and government officials (see SS D.12.11)

Directions

For this activity you will describe in detail how the scenario described below affects business, business investors, consumers, and government officials.

Write your response in a two-page written paper. Your paper should be word processed, using a font size no larger than 12 and no more than double-spaced. Include an additional page which visually depicts the interaction among the business, business investors, consumers and government officials. You can use a software application or hand-create the visual aid.

Scenario

The Village of Verona is considering spending $100,000 on playground equipment in the city park. Right now, interest rates are relatively high at 8-1/2%. To finance the new playground equipment the Village of Verona would borrow from the local bank, the Verona State Bank. What effects will occur if the Village of Verona decides to go ahead with this relatively high loan? Consider all of the following entities as you write your response: Business Investors, Businesses, Consumers, and Government. Use this scenario for your visual aid.

Using the same information as above, write your response assuming that the Village of Verona has decided to forego the loan and wait until interest rates come down to 6-1/2%. Again, consider the following entities as you write your response: Business Investors, Businesses, Consumers, and Government.

Student Name ______________________ Date ____________________

Describe Interest Rate Influences

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely
U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. Paper is two pages long	S U	
2. Paper is word processed using a font no larger than 12 point and no more than double-spaced	S U	
3. Paper includes a visual aid	S U	
4. Visual aid describes the interaction between business, business investors, consumers and government officials	S U	
5. Paper describes the consequences for businesses if the loan went through	S U	
6. Paper describes the consequences for business investors if the loan went through	S U	
7. Paper describes the consequences for government officials if the loan went through	S U	
8. Paper describes the consequences for consumers if the loan went through	S U	
9. Paper describes the consequences for businesses if the loan did not go through	S U	
10. Paper describes the consequences for business investors if the loan did not go through	S U	
11. Paper describes the consequences for government officials if the loan did not go through	S U	
12. Paper describes the consequences for consumers if the loan did not go through	S U	

Teacher ______________________________ Date ____________________

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Directions to Teacher

None.

Business Standards E

Entrepreneurship

CONTENT STANDARD

Students in Wisconsin will use business knowledge and preparation to develop an understanding of business operations and the ability and skills necessary to become entrepreneurs.

Rationale: The major components of entrepreneurship incorporate the basic structure of business (e.g., accounting/finance, economics, international business, law, marketing, and management). Therefore, it is essential for students to have an understanding of entrepreneurship and its place in the education of business.

PERFORMANCE STANDARDS

E.12.1 Analyze the degree to which one possesses the characteristics, skills, and abilities of an entrepreneur (see SS D.8.8)
E.12.2 Participate in a career-related, community service activity
E.12.3 Discuss the effects of promotion on pricing and demand for goods (see SS E.4.10, E.8.8, E.12.7)
E.12.4 Complete a commercial loan application
E.12.5 Identify personnel needed for a small business
E.12.6 Define the interdependence of foreign and domestic markets (see SS D.8.3, D.8.11, D.12.8)
E.12.7 Define franchising and describe the relationship with other forms of business organizations
E.12.8 Discuss appropriate responses to unethical behavior in the workplace
E.12.9 Identify resources available to entrepreneurs when preparing a business plan
E.12.10 Operate a small business
E.12.11 Describe the business cycle
E.12.12 Compare ways to finance a business venture

Characteristics of an Entrepreneur

Standard

E.12.1 Analyze the degree to which one possesses the characteristics, skills, and abilities of an entrepreneur (see SS D.8.8)

Prompt

You have plans to start your own business, but before you begin putting your business plan together you feel an assessment of your character would help you.

Directions

In this activity you will identify the characteristics that are common to people who are successful entrepreneurs and then assess your own personal characteristics to assess whether or not you possess the skills needed to be an entrepreneur.

1. Participate in a class discussion on entrepreneurs. Examine several real-life entrepreneurs using personal examples or cases presented in newspapers/magazines/books. Identify the characteristics that made them successful. Post the characteristics on the board. Create a definition for an entrepreneur.
2. Complete a self-assessment to test your potential as an entrepreneur.
3. Compare your traits with the entrepreneurial characteristics in the assessment. Prepare a written summary for your instructor. Include the following information:
    - In the first paragraph describe which entrepreneurial characteristics you presently possess
    - In the second paragraph, select one entrepreneurial trait in which you rated low. Suggest 2 or 3 things you could do to develop the characteristic
    - In the last paragraph describe what interests you about being an entrepreneur or why you would choose not to become an entrepreneur

Student Name ______________________ Date ______________

Characteristics of an Entrepreneur

Scoring Standard

You must achieve a rating of at least "2" or "yes" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds requirement
2= Meets requirement
1= Does not meet requirement fully
0= Is not present, is incomplete or incorrect

Scoring Guide

Criteria	**Rating**	**Comments**
1. You complete the entrepreneurial self-assessment	yes no	
2. Summary includes a description of which entrepreneurial characteristics you presently possess	3 2 1 0	
3. Summary includes one entrepreneurial trait in which you rated low	3 2 1 0	
4. Summary includes suggestions of 2 or 3 things you could do to develop the characteristic	3 2 1 0	
5. Summary includes a description of what interests you about being an entrepreneur or why you would choose not to become an entrepreneur	3 2 1 0	

Teacher ______________________ Date ______________

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Directions to Teacher

1. Begin by leading the discussion over entrepreneurship to set the state for the activity. If desired you could have students each bring a case study (example) of an entrepreneur to class for discussion. Doing an Internet search using the keyword "entrepreneur" will turn up several good examples for discussion.
2. Provide students with a self-assessment on entrepreneurship. Several activities are available on the Internet. You can have students take them (and be scored) on the Internet, or download the assessment and print out copies for students.
    - The Entrepreneur Quiz from EDTEC:
      http://www.edtecinc.com/ nyequiz.htm
    - The Am I an Entrepreneur? Self-Assessment from Canada Workforce Development:
      http://www.deo.gc.ca/eng/content/toolkit/ self/xindex/html
    - The Entrepreneur Quiz from Future City:
      http://www.futurecity.com/quiz/demo1.htm
    - Do You Have What It Takes to Be an Entrepreneur? from Village Career:
      http://www.ivillage.com

Standard

E.12.2 Participate in a career-related, community service activity

Directions

For this activity you will job shadow someone connected with your local community service department.

1. Write a letter of inquiry to a community service coordinator in your community asking about job shadowing opportunities.
    - Explain why you are interested in job shadowing community service activities
    - Inquire about job shadowing opportunities
    - Provide information relative to you -- phone numbers, e-mail address, hours to reach you, etc.
    - Conclude the letter appropriately
2. Complete the job shadowing experience. Use the Suggested Interview Questions handout to help you gain the most from your job shadowing experience.
3. Complete the Student Reaction Form after you complete the job shadowing. Write a thank-you letter to your job shadow supervisor. Submit your Student Reaction Form, a copy of the thank-you letter, and the scoring guide to your teacher for evaluation.

Suggested Interview Questions

Use following questions as a guideline for conversation during your job shadowing experience.

1. What is your job title?
2. What skills are needed to do your job?
3. How did your education help prepare you for this job?
4. Did you receive any additional training to perform this job?
5. How would an individual obtain a position like this one?
6. What benefits are associated with the job?
7. What promotion/advancement opportunities are possible?
8. Name some things about your job that you like or that are exciting to you.
9. Could you please relate job requirements to course work in school and transferable skills, such as, communication, problem solving and teamwork?
10. What kind of lifestyle is associated with this career?
11. Are people with your kind of skills usually needed, even when business may be bad? Is your work seasonal?
12. How do you balance your family and career responsibilities?
13. What are the opportunities for advancement?
14. Name some things about your job that you find challenging.

15. What is a typical day like on your job?

16. Approximately what is the starting pay or pay range for someone in your profession?

17. What should a high school student be doing now to enter your occupation after graduation?

18. From your experience what are the most important things students should learn in school to prepare for a job?

19. What advice would you give to someone who was thinking about becoming a ____________________?

20. How do you think your job will change in the next five years?

Student Reaction Form

Name of student: ____________________

Name of person shadowed: ____________________

Person's occupation: ____________________

Person's place of employment: ____________________

Date of shadowing experience: ____________________

1. What things did you enjoy most about the job shadowing experience?

2. Has this experience reinforced your desire to have a career in this field or discouraged you from planning a career in this field?

3. What suggestions do you have for improving this observation experience?

Attach a copy of the thank-you letter to this form.

Student Name ______________________ Date ________________

Job Shadowing Possibilities

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	**Rating**	**Comments**
1. You compose inquiry letter to the community service coordinator for your community	S U	
2. Letter is word processed, one page and block style	S U	
3. Letter includes appropriate salutation	S U	
4. Letter explains why you are interested in community service activities	S U	
5. Letter inquires about opportunities to job shadow	S U	
6. Letter includes appropriate personal information	S U	
7. Letter includes appropriate conclusion	S U	
8. Letter evidences correct grammar, punctuation and spelling	S U	
9. You participate in the job shadowing experience	S U	
10. You complete the Student Reaction Form	S U	
11. You submit a thank-you letter to the job shadow supervisor	S U	

Teacher ______________________ Date ________________

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Directions to Teacher

1. Before you begin this activity, contact the Community Service Department to make sure your students can job shadow there. If you are unable to use the community service department itself, brainstorm with your students several community related services they could contact as possibilities.
2. Make copies of the Suggested Interview Questions and Student Reaction Form handouts. Review the directions, handouts and scoring guide with students.
3. Keep a master list of the student job shadowing dates. Collect all necessary forms required by the job shadowing organizing.
4. Review the list of questions to ask at the job site. Add to the list if desired.

Promotion's Effects on Pricing and Demand

Standard

E.12.3 Discuss the effects of promotion on pricing and demand for goods (see SS E.4.10, E.8.8, E.12.7)

Directions

Promotions are designed to help people see the advantages of your product, and hopefully buy it. But how does promotion effect pricing? In the activity you will assess the effect of promotion on pricing and demand.

1. Read the scenario.
2. Research the effect of promotion on pricing and demand. Use the Internet and class materials provided by your teacher. Discuss what type of promotion would be most effective for your pies. Research the actual local cost of the promotions you consider (if this is not provided by your teacher). Discuss how the increased promotion cost will effect the cost of your pies. Compare three types of promotion.
3. Make a decision about what to do about your promotion. Develop a Promotion Proposal and submit it to your teacher. In your proposal compare the cost/benefits of three different types of promotions. Include the following information:
   - Describe three potential promotion types
   - Indicate the cost of each type of promotion
   - Indicate the projected profits that could be generated using each type of promotion
   - Indicate the impact of the cost of each type of promotion on the price of the pie
   - Describe the type of promotion you recommend and why

Scenario

You own Poppy's Pies. A representative from the local newspaper came by yesterday to talk with you about increasing your advertising in the paper. He suggested that if you increase your promotion in the paper you could attract at least 50% more customers. Currently you are not advertising at all. You sell approximately 500 pies per month. You make a profit of $2.00 per pie you sell. You are selling your pies for $6.00 a pie.

You would like to sell more pies and make more money. But you don't want to lose any of the profit you are already making. What should you do?

Student Name ______________________ Date ____________________

Promotion's Effects on Pricing and Demand

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds requirement
2= Meets requirement
1= Does not meet requirement fully
0= Is not present, is incomplete or incorrect

Scoring Guide

Criteria	Rating	Comments
1. Promotion proposal includes a description of 3 different promotion types	3 2 1 0	
2. Promotion proposal includes a comparison of the cost of each type of promotion	3 2 1 0	
3. Promotion proposal includes a comparison of the projected profits generated using each promotion type	3 2 1 0	
4. Promotion proposal includes a comparison of the price of the pie using each type of promotion	3 2 1 0	
5. Promotion proposal includes a description of the type of promotion you will use and why	3 2 1 0	
6. Promotion proposal is professionally presented	3 2 1 0	
7. Promotion proposal evidences correct grammar, punctuation, and spelling	3 2 1 0	

Teacher ______________________________ Date ____________________

BEST COPY AVAILABLE

Directions to Teacher

1. Divide participants into small groups to conduct the activity. Review the directions and scoring guide.
2. If possible, make available actual local pricing lists for various types of promotions: newspaper ads (by size), bill boards, radio, tv. etc. Otherwise make the research for pricing part of the student work.

Complete a Commercial Loan Application

Standard

E.12.4 Complete a commercial loan application

Directions

For this activity you will complete a commercial loan application. Make sure all blanks are filled in. Pay attention to details and print neatly. Use a calculator to figure monthly payments. Then complete a one-page, word-processed report on what to do if your application is refused. Identify at least two other sources of funding you could pursue. Evaluate each source.

Begin by reading the scenario outlined below.

Scenario

You have a great idea for a business, but you need $10,000 for start-up. You have $3000 in savings and can secure $2000 more from your parents. But you need a loan for the rest. It is time to complete a commercial loan application at the local financial institution.

Student Name ______________________ Date ________________

Complete a Commercial Loan Application

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely.

Scoring Guide

Criteria	**Rating**	**Comments**
1. Application exhibits 100 percent correct and appropriate grammar, punctuation, spelling, syntax, and word usage	S U	
2. Application has all required items filled in completely	S U	
3. Application information is written legibly in black ink or typed	S U	
4. Application calculations are completed accurately	S U	
5. Application is neat	S U	
6. Application is signed and dated	S U	
7. Report includes an evaluation of at least two lending alternatives	S U	
8. Report is professionally presented	S U	
9. Report evidences correct spelling, punctuation and grammar	S U	

Teacher ___________________________ Date ________________

BEST COPY AVAILABLE

Directions to Teacher

1. Obtain a sample commercial loan application from a local financial institution for students to use for this activity.
2. Review the directions and scoring guide. Note the criteria for completing the loan application. Discuss alternative forms of funding.

Standard

E.12.5 Identify personnel needed for a small business

Directions

1. Read the prompt below.
2. Determine your personnel needs. Identify the types of jobs you need to fill and list the duties for each position. Brainstorm at least three scenarios to meet your needs. Include a mixture of full- and part-time employees. Record your ideas on the Personnel Needs handout. Discuss the pros and cons of each scenario.
3. Choose the best scenario. Record your decision on your Personnel Decisions handout.
4. Submit your Personnel Needs handout, Personnel Decision handout, and scoring guide to your instructor for evaluation.

Scenario

You own Poppy's Pies. Your pie shop bakes and sells pies at a small store/ restaurant in your town. You serve anywhere from 100 - 200 people per day. Most people use carry-out, but more recently people have been purchasing a piece of pie and coffee and sitting down at the shop to eat. You have 6 small tables in the shop. Your busiest time every day is between 2:45 and 6:00. You open at 11:00 a.m. and close at 7:00 p.m. Monday through Saturday.

You need to hire personnel for the pie shop. Employees must be paid at least minimum wage. A good pie baker will cost you at least $15.00 per hour.

Personnel Needs

Name ____

1. What types of positions do you need to fill for your company?

Position Title	Duties

2. Describe the scenarios you would use for making sure you have adequate floor coverage for your company?

Scenario	Position (position type, number and whether they are full or part-time)	Pros and Cons of This Scenario
Scenario 1		
Scenario 2		
Scenario 3		

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Personnel Decision

Name

Store Name

Personnel Decision

Rationale for the Decision

Student Name ________________________ Date ___________________

Jobs in a School District

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	**Rating**	**Comments**
1. Group determines the personnel needs for the case study	S U	
2. Group identifies at least three scenarios for filling the personnel needs	S U	
3. Group identifies the pros and cons for each scenario	S U	
4. Group chooses the best scenario	S U	
5. Group explains why they chose the scenario	S U	
6. Group decisions are well thought out, realistic, and rational	S U	

Teacher _____________________________ Date ___________________

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Directions to Teacher

1. Divide students into small groups to complete this assessment. Review the directions and scoring guide. Distribute copies of the handouts.
2. If desired, create a different scenario for each group to discuss.

Import and Export Impact

Standard

E.12.6 Define the interdependence of foreign and domestic markets (see SS D.8.3, D.8.11, D.12.8)

Directions

In this activity you will evaluate the impact of importing and exporting on countries. You will be assigned several countries to study by your teacher.

1. For each country research the following:
    - The 3 major exports for the country
    - The 3 major imports for the country
    - How the exports or imports have changed over the past 10 years

    Record your findings on the Import and Export Chart.
2. Word-process your findings. Record them in a chart form.
3. Submit your chart and the scoring guide to your instructor for evaluation.

Import and Export Chart

Name of the Country	Top Three Exports	Top Three Imports	Economic Trends over the past 10 years	Ways the Market Meets Their Economic and Production Needs

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Student Name ______________________ Date ________________

Import and Export Impact

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. Chart includes three exports for each country	S U	
2. Chart includes three imports for each country	S U	
3. Chart includes details on the economic trends exports and imports have had over the past 10 years in each country identified	S U	
4. Chart includes details regarding methods that different markets employ to meet their economic needs and the interdependence that results	S U	
5. Chart is well-organized and professionally presented	S U	

Teacher __________________________ Date ________________

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Directions to Teacher

1. Review the directions and scoring guide. Distribute handouts.
2. Assign each person 2 countries to research in addition to the United States. The CIA World Fact Book (on the Internet or available in print) is an excellent source of information for this activity.

Select a Franchise

Standard

E.12.7 Define franchising and describe the relationship with other forms of business organizations

Directions

For this activity you will research a variety of franchises available and select one you would like to pursue. Then you will record your findings in a written report.

1. Read newspapers or search the Internet for 3 franchise opportunities.
2. Research the franchises and define each business and its franchise package.
3. Present your findings in a report comparing the franchise opportunities. Make sure you meet all of the requirements on the scoring guide. Use charts, graphs, etc., to present your information if appropriate.
    - Their locations
    - How long they have been in business
    - What type of business ownership they offer
    - Initial investment or start-up cost
    - The disadvantages and advantages of owning each franchise

Student Name ______________________ Date ____________________

Select a Franchise

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds requirement
2= Meets requirement
1= Does not meet requirement fully
0= Is not present, is incomplete or incorrect

Scoring Guide

Criteria	Rating	Comments
1. Report compares three franchises	3 2 1 0	
2. Report includes details on the business locations	3 2 1 0	
3. Report includes information about how long each franchise has been in operation	3 2 1 0	
4. Report includes information regarding the type of business ownership	3 2 1 0	
5. Report includes information on start-up cost	3 2 1 0	
6. Report includes a discussion of the advantages and disadvantages of each type of franchise	3 2 1 0	
7. Report includes copies of the advertisements	3 2 1 0	

Teacher ____________________________ Date ____________________

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Directions to Teacher

You may want to supply a variety of franchise resources like Entrepreneur magazine.

Standard

E.12.8 Discuss appropriate responses to unethical behavior in the workplace

Directions

For this activity you will discuss appropriate responses to unethical behavior in the workplace. Follow the steps below to complete this activity.

1. Read the prompt below.
2. Write an essay documenting the following:
   - Your initial response
   - Whether your response it ethical or unethical
   - How unethical and ethical behavior affects business, shoppers, and employees
   - An example of a similar case and how people in the case responded

Scenario

You are working in a local supermarket. Your job is to stock shelves. At the end of the shift, you are walking out of the back door, when one of your fellow employees says, "Here are six extra cans for you and six for me." What is your response?

Student Name ________________________ Date ____________________

Respond to Unethical Behavior

Scoring Standard

You must achieve a rating of at least “2” or on each criterion to demonstrate competence.

Rating Scale

3= Exceeds requirement
2= Meets requirement
1= Does not meet requirement fully
0= Is not present, is incomplete or incorrect

Scoring Guide

Criteria	**Rating**	**Comments**
1. Essay includes a description of how you would respond to the situation	3 2 1 0	
2. Essay includes an analysis of whether the situation is ethical or unethical and why	3 2 1 0	
3. Essay includes a discussion on how ethical and unethical behavior can impact a business, the shopper and the employees	3 2 1 0	
4. Essay includes a similar example	3 2 1 0	

Teacher ______________________________ Date ____________________

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Directions to Teacher

1. Review the directions and scoring guide.
2. You might lead a discussion over a definition of ethical behavior and brainstorm characteristics.
3. After students have written their essays, you could conduct a round table discussion over the responses.

Business Plan Resources

Standard

E.12.9 Identify resources available to entrepreneurs when preparing a business plan

Directions

For this activity you have chosen a business you would like to begin and to start the process you will need to identify the resources available to entrepreneurs when preparing a business plan.

You will need to complete a resource report on developing a business plan.

1. Research a variety of media resources on preparing a business plan. Note what type of information you need to prepare your business plan and where you can locate the information.
2. Compile your findings in a one-page, word-processed Resource Report. Cite each resource you located, contact information for the resource, and what type of information you can locate there. Cite at least 10 resources.

Student Name ______________________ Date ________________

Business Plan Resources

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	**Rating**	**Comments**
1. Resource report cites at least 10 sources	S U	
2. Resource report includes complete information about how to contact each resource	S U	
3. Resource report includes a brief summary about the kind of information available from each resource	S U	
4. Sources provide useful information	S U	
5. Sources are directly related to the type of information needed for a business plan	S U	

Teacher ________________________ Date ________________

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Directions to Teacher

None.

Present a Business Plan

Standard

E.12.10 Operate a small business

Directions

For this activity your will present the business plan for a business of your choice.

1. Determine a small-business in your community that you would like to research for this activity.
2. Interview (via phone, in-person, or using email) the business owner. Obtain the following information:
    - The mission of the company
    - How the owner obtained start-up funding
    - Where the business is located
    - How the location was determined
    - How the business is advertised
    - An organizational chart
    - The logo for the company
    - Days and times of operation
    - Cost and selling price of goods
3. Prepare an electronic slide show of your findings. You must include at least 10 slides and approximately 5 minutes in length when presented. Incorporate graphics, photos, sound etc. to add interest and detail to your slides.
4. Present your slide show to your class.

Student Name ____________________________ Date ______________________

Present a Business Plan

Scoring Standard

You must achieve a rating of at least "2" or on each criterion to demonstrate competence.

Rating Scale

3= Exceeds requirement
2= Meets requirement
1= Does not meet requirement fully
0= Is not present, is incomplete or incorrect

Scoring Guide

Criteria	**Rating**	**Comments**
1. Presentation includes the mission of the company	3 2 1 0	
2. Presentation includes information on how the owner obtained start-up funding	3 2 1 0	
3. Presentation includes information on where the business is located	3 2 1 0	
4. Presentation includes information on how the location was determined	3 2 1 0	
5. Presentation includes information on how the business is advertised	3 2 1 0	
6. Presentation includes an organizational chart	3 2 1 0	
7. Presentation includes a copy of the company logo and slogan (if there is one)	3 2 1 0	
8. Presentation includes the days and times of operation	3 2 1 0	
9. Presentation includes the cost and selling price of goods	3 2 1 0	
10. Presentation includes at least 10 slides	3 2 1 0	
11. Presentation is graphically appealing	3 2 1 0	

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Criteria	Rating	Comments
12. Presentation evidences correct spelling, grammar and punctuation	3 2 1 0	
13. You present your slides to the class in an organized, prepared manner	3 2 1 0	

Teacher ______________________ Date ______________

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Directions to Teacher

1. Review the directions and scoring guide.
2. Help students identify small businesses to study.
3. Arrange for students to use multi-media software. If the software is unavailable, students could create a series of overhead or posters for their presentations.

Business Cycle Report

Standard

E.12.11 Describe the business cycle

Directions

When you are researching opportunities for self-employment it is essential to observe and understand the business cycle. In previous activities you have selected a business to purchase and researched how to write a business plan. Now take it a step further and write a one-page report on all facets of the business cycle and how they might affect your business plan.

- Define economic terms such as recovery, recession, depression and prosperity
- Describe the relationship of each to each other
- Describe the consequences to the business plan with each facet of the business cycle
- Identify the causes and consequences of each "turn" in the business cycle

Attach an illustration of the business cycle as it relates to selected business and business plan.

Student Name ____________________ Date ________________

Business Cycle Report

Scoring Standard

You must achieve a rating of at least "2" or on each criterion to demonstrate competence.

Rating Scale

3= Exceeds requirement
2= Meets requirement
1= Does not meet requirement fully
0= Is not present, is incomplete or incorrect

Scoring Guide

Criteria	**Rating**	**Comments**
1. Report includes definitions for economic terms such as recovery, recession, depression and prosperity	3 2 1 0	
2. Report includes a description of the relationship between economic terms and the business cycle	3 2 1 0	
3. Report includes a description of the consequences to the business plan with each facet of the business cycle	3 2 1 0	
4. Report incudes the a summary of the causes and consequences of each "turn" in the business cycle	3 2 1 0	
5. Report includes an attached illustration of the business cycle as it relates to selected business and business plan	3 2 1 0	
6. Report evidences correct spelling, grammar and punctuation	3 2 1 0	

Teacher ________________________ Date ________________

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Directions to Teacher

Use this standard with other Entrepreneur standards in E12 such as E12.10 and E12.9. They can easily link together to be completed by the student over a period of time.

Compare Ways to Finance a Business Venture

Standard

E.12.12 Compare ways to finance a business venture

Directions

For this activity you will research financing options for a small business.

1. Start by choosing a type of business to research.
2. Research three financing options for your business. If you do not know the amount of start-up capital you would need, assume it is $10,000. Locate the following information for each financing option:
    - Name of the institution
    - Specifics of the financing agreement
    - Advantages of the financing option
    - Disadvantages of the financing option

   Be sure to note the pros and cons of debt and equity financing. Compile your findings into a word-processed chart.
3. On the bottom of the chart or on a separate piece of paper, indicate which of the financing options you would choose and indicate why.
4. Submit your chart, your rationale and the scoring guide to your teacher for evaluation.

Scenario

You are going to begin your own business and now need to get some financing. But before you apply for commercial loans, you need to do some thorough research about the types of financing available to you and your business venture.

Student Name ______________________ Date __________________

Compare Ways to Finance a Business Venture

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds requirement
2= Meets requirement
1= Does not meet requirement fully
0= Is not present, is incomplete or incorrect

Scoring Guide

Criteria	**Rating**	**Comments**
1. Chart includes a comparison of three different financing options	3 2 1 0	
2. Chart includes the specifics of each financing agreement	3 2 1 0	
3. Chart includes the advantages of each financing option	3 2 1 0	
4. Chart includes the disadvantages of each financing option	3 2 1 0	
5. You indicate the most logical choice for financing your business venture and provide a rationale for your decision	3 2 1 0	
6. Work is professionally presented	3 2 1 0	

Teacher ____________________________ Date __________________

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Directions to Teacher

Provide students with examples of various types of business venture financing and resources for researching the types of financing available to the small business.

Business Standards F

Marketing

CONTENT STANDARD

Students in Wisconsin will describe how marketing strategies are used in business to meet the needs of consumers.

Rationale: Marketing is connected to almost every function of business. All people in an organization are responsible for meeting the needs of their consumers and should, therefore, be familiar with the processes involved with marketing.

PERFORMANCE STANDARDS

F.12.1	Explain how marketing benefits all businesses
F.12.2	Define marketing mix
F.12.3	Describe current trends that affect the marketing mix
F.12.4	Describe how government regulates marketing (see SS D.12.5)
F.12.5	Describe how marketing problems are identified
F.12.6	Describe the market research process
F.12.7	Describe the factors that influence a consumer's decision to buy
F.12.8	Identify the elements of the promotional mix
F.12.9	Identify the role of marketing in the United States economy
F.12.10	Describe various methods of product distribution (logistics)

Defining the Role of Marketing

Standards

F.12.1 Explain how marketing benefits all businesses
F.12.9 Identify the role of marketing in the United States economy

Directions

For this activity you have been assigned to a team to learn how marketing benefits businesses and the role marketing plays in the U.S. economy. As a team you will develop ideas on the role of marketing and how it can benefit business by creating a diagram that shows the relationships between marketing and the economy and the ways that marketing can benefit an economy and its businesses. Before you can contribute to your team, you need to become an expert in a certain area. You will be given a concept in which you will become an expert!

For this activity you will:

1. Take the term you have been given (exchange, marketing, economy) and define it. Be clear and complete and think of an example. Write your ideas on a sheet of paper and hand them in to your teacher for evaluation.
2. Next, as a team, share your individual expertise and discuss how your terms relate to each other.
3. Draw a diagram that shows the relationship between the terms. On the end of the diagram should be a circle with the word "businesses" in it. On the other end of the diagram should be a circle with the word "consumers" in it. This diagram now represents a very simple version of an economy.
4. In an economy, trade takes place to bring consumers and businesses together. This is also known as exchange. Illustrate on your diagram this exchange process in your own way. Be sure to identify on your diagram what is being exchanged.
5. Marketing helps the exchange process take place in a number of ways. On your diagram, draw how you think marketing fits into this process. Include, by using words to describe, how marketing helps in the exchange process and how both consumers and businesses benefit from marketing.
6. Next, draw a box at the bottom of your page. Title this box, "Marketing and the Economy." In this box briefly describe the role that marketing plays in the U.S. economy. Use your diagram as a guide. Hand in this diagram and your individual terms and definitions to your instructor.
7. If requested by your instructor, you may be asked to discuss your diagram with your peers.

You will be evaluated by your instructor regarding the material assigned and presented for evaluation and you will be evaluated by other members of your team regarding your participation and role on the team.

Student Name ______________________ Date __________________

Defining the Role of Marketing Teacher Evaluation

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Covered the criterion accurately and completely.

No= Did not cover the criterion accurately and completely.

Scoring Guide

Criteria	**Rating**	**Comments**
1. Diagram illustrates the relationship between business and consumer	Yes No	
2. Diagram illustrates how marketing fits into the exchange process	Yes No	
3. Diagram illustrates the role of marketing and how it benefits business	Yes No	
4. Illustration includes written description of how marketing helps in the exchange process and how both consumers and businesses benefit from marketing	Yes No	
5. Diagram is visually appealing	Yes No	
6. Diagram, assigned terms and definitions are submitted to instructor for evaluation	Yes No	

Teacher ____________________________ Date __________________

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Student Name ______________________ Date ________________

Defining the Role of Marketing Team Member Evaluation

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. Team member participates in discussion of terms associated with economic change	S U	
2. Team member assists in compiling list of terms associated with economic change	S U	
3. Team member is familiar with assigned area of "expertise" and contributes to discussion of assignment based as an "expert"	S U	
4. Team member participates in creating a team diagram illustrating the exchange process	S U	
5. Team member is prepared to orally present diagram and lead discussion identifying how marketing benefits all businesses and the role of marketing in the United States economy	S U	

Teacher ____________________________ Date ________________

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Directions to Teacher

1. Break the class into groups of three students (minimum). Give the group the directions and assign each student one of the following terms or concepts: marketing, exchange, economy.

   If you have a group of three or more, show how businesses benefit from marketing; and how marketing benefits the U.S. economy.
2. Give the students class time (or homework) to define the concepts, to give examples of their terms and concepts and to write a brief (one page maximum) summary of their terms.
3. Have the students teach their group members about their individual concepts or terms. Next, give them the directions for their group diagram building project.
4. Give the students one class period to develop their diagrams. These can be done on any size paper and should be done using colored markers, etc. The students are to hand in the completed diagram and individual definitions on sheet summaries as a group.
5. A group presentation could be beneficial to the entire class. As an option, you may want the groups to discuss their diagrams with the rest of the class.
6. Assessment can be done by reading the diagrams and the individual concept sheets by observing group participation and by viewing the optional group presentations.

Analyze Marketing Mix

Standards

F.12.2	Define marketing mix
F.12.3	Describe current trends that affect the marketing mix

Directions

A marketing mix is a continually changing component in business today. In this assessment activity you will investigate what a marketing mix is and how current trends affect it.

You will be working as part of a "company" to look at ways that current trends may be affecting your company's marketing mix. Your company has been given a product that you are responsible for marketing and you have determined an appropriate marketing mix. Your supervisor wants you to report back to her on your changes to the marketing mix. You will be assigned one of four positions within your company: product specialist, place specialist, price specialist or promotion specialist. Your job is to help the entire company determine current trends that may affect your company's marketing mix.

For this activity you will need to complete the steps outlined below. You will be evaluated by your teacher, your peers and your team members.

1. Break into groups according to the specialty that has been assigned to you by your instructor (product, place, promotion, price, etc.).
2. In your group of "specialists", define the part of the marketing mix that you have been assigned and discuss current trends in your area. Each member should write the definition and list 5-10 changes that may affect their group's specialty.
3. Discuss the mix and current trends with the specialists in your group with regard to each of the company products that have been assigned. As specialists you are going to be applying your special knowledge of each company's product.
4. Return to your group and, going from one specialist to another, discuss the definitions of the specialties and the trends. Take notes on each of the specialties while other specialists present their ideas.
5. Apply this information to the product that your company has been assigned. Define the marketing mix that your company would use for the product that has been assigned to your group. Also, identify changes and trends that may alter this mix for your product.
6. Present your company's product and marketing mix to the rest of the class making sure to cover steps 2-5 above. Identify the parts of the marketing mix and how they relate to your product and the current trends that may affect your marketing mix.

Student Name ______________________ Date __________________

Analyze Marketing Mix Instructor and Peer Evaluation

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Covered the criterion accurately and completely.

No= Did not cover the criterion accurately and completely.

Scoring Guide

Criteria	**Rating**	**Comments**
1. Oral presentation defines area of marketing mix assigned	yes no	
2. Oral presentation outlines current trends in marketing that affect marketing mix	yes no	
3. Oral presentation relates trends to relative company products represented in the group	yes no	
4. Oral presentation defines a marketing mix for assigned company and product	yes no	
5. Oral presentation identifies the parts of the marketing mix and how they relate to product	yes no	
6. Oral presentation identifies current trends that may affect selected marketing mix	yes no	

Teacher ___________________________ Date __________________

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Directions to Teacher

You will need to assign the groups a "company" and area of expertise, realizing the current trends and mixes in the market today.

1. Break students into their "companies" of four students. Inform each company that marketing mix is essential to the success of a product and that the market is always changing and current trends may require changes to their marketing mix.
2. Have the student break out by specialties and have the students discuss their specialties and how current trends may affect their product. After ten minutes have them get back into their companies and, cooperatively, share what they know about their specialty, trends and their products. Collectively, the company should decide what mix is best for their company and product. The company is to then present their ideas on their products and the marketing mix to the entire class.

Standard

F.12.4 Describe how government regulates marketing (see SS D.12.5)

Directions

Many facets of our lives are impacted by government regulations. What you watch on TV, how fast you drive, what you eat and drink, and how late you can stay out are all impacted by government regulations. Business and marketing are no exception. Throughout the years, new laws and regulations have been created to protect consumers.

In this activity you will be reporting on one such law and participating along with other members of the class in building a "Marketing Regulation Timeline" which will show how these changes have impacted the history of marketing.

To do your research:

1. Use resources that are available in your guidance office, library or on the Internet, and background information provided by your teacher to research, report and present on the legislation that has been assigned to you.
2. Your report is to be one page, word processed and is to highlight the following:
   - When did the regulation go into effect?
   - Why was the legislation created, why was it needed?
   - What does the regulation do?
   - How does it affect the way businesses operate?
   - What are the impacts on the consumer?
3. Be prepared to discuss your presentation with your peers.
4. Write a brief 2-5 paragraph summary of all oral material presented -- summary should discuss how government regulations have impacted marketing.

Student Name ________________________ Date ____________________

Marketing Regulations Teacher Evaluation

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Covered the criterion accurately and completely

No= Did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. Report discusses when regulations went into effect	Yes No	
2. Report includes discussion about why legislation was created	Yes No	
3. Report includes an explanation of how legislation works	Yes No	
4. Report includes information on how legislation affects business operations	Yes No	
5. Report includes information on how legislation impacts consumers	Yes No	
6. Report evidences correct spelling, grammar and punctuation	Yes No	
7. Report is presented orally to others in class	Yes No	
8. Summary of oral material discussed how government regulations have impacted marketing	Yes No	
9. Summary is 2-5 paragraphs long	Yes No	

Teacher ______________________________ Date ____________________

BEST COPY AVAILABLE

Directions to Teacher

1. Provide students with background information on government regulations in marketing. A good source of information for related regulation is *Marketing Essentials* by Glencoe.
2. Assign students (either individually or in pairs) to a piece of legislation such as the Sherman Antitrust Act of 1890 or The Clayton Act of 1914. Review the directions and provide time and resources they need to generate quality results.
3. When the reports are completed have students share the information with the class. Discuss how each of the regulations may have impacted business and consumers.
4. Using the reports, create a "Marketing Regulations Timeline" on a class wall. List dates on the timeline and place the reports on the appropriate dates.
5. Have the students individually write a brief (2-5 paragraphs) summary entitled "Government Impacts on Marketing."
6. Assessment can be done by reading the reports, observing the presentations, and possibly by written exam after the lesson is complete.

Market Research

Standards

F.12.5 Describe how marketing problems are identified
F.12.6 Describe the market research process

Directions

As you know, the goal of marketing is to provide consumers with products and services that meet their needs and wants. Failure to meet the needs and wants of consumers often leads to the failure of a product or business. As a result, businesses go to great lengths to understand what customers want and need. This process is called market research.

In this activity you will investigate the world of market research — its importance, the research process and how to identify marketing problems. Throughout this activity, ask yourself, "Where would a business be if it didn't understand a customer's needs and wants?"

1. Complete the "Market Research Worksheet."
2. Answer the questions at the end of the worksheet on a separate sheet of paper.
3. Be prepared to share your information orally with your peers.

Student Name ____________________ Date ________________

Market Research

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. Worksheet answers define the marketing problem	S U	
2. Worksheet answers identify how obtaining data is a tool to finding the solution to the problem	S U	
3. Worksheet answers suggest alternatives to analyzing data as part of the market research process	S U	
4. Worksheet answers suggest a possible solution for the identified marketing problem	S U	
5. Worksheet answers suggest a plan that would act on the results of marketing research	S U	
6. You participated in discussion identifying marketing related problems with your peers	S U	

Teacher ____________________ Date ________________

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Directions to Teacher

1. Give students the needed background information regarding the market research process. Stress the importance of meeting the needs and wants of consumers in marketing. Glencoe's *Marketing Essentials* is a fine source of background information.
2. Give students the activity sheet entitled *Market Research Worksheet*.
3. Create a bulletin board entitled "Market Research." On the bulletin board have an area entitled "The Market Research Process" and an area entitled "Discovering Marketing Problems."
4. When the student worksheets are complete and the students have completed the questions, discuss with the students the Market Research Process. Put the parts of the process on the bulletin board below the appropriate heading.
5. Next, discuss the problem areas that market research deals with. Create subheadings on the bulletin board entitled "Price, Place, Promotion, and Product." Have students identify marketing problems that can be found in each of the four areas.

Market Research Worksheet

Market research is a valuable tool in marketing. Through market research, businesses can find answers to problems that may be difficult to solve in other ways.

In order to understand the market research process, we first need to understand some of the problems that marketers face. The majority of marketing problems deal with the marketing mix (price, product, place, and promotion). For example, a business may be interested in creating a new product to meet a need with a certain group of consumers. Below are some common marketing problems:

Product

- What characteristics do the customers want in a product? (Size, color, etc.)
- What level of quality do customers want?

Price

- Do we want to price our product as a "premium" and have a relatively high price?
- Do we want to establish our product as a discount or value item?
- What are our competitors doing with regard to price?

Place

- How do we want to distribute our product?
- Should we set up exclusive distribution outlets or should we make our product available everywhere?
- What are some new distribution avenues that are becoming available? (Internet shopping, direct mail, etc.)

Promotion

- How do we reach our customer?
- What magazines do they read? What television shows do they watch?

These are all very common marketing related problems and can all be solved through market research.

1. Using each of the areas of the marketing mix, generate one problem that you feel may be common in business and marketing.

   Product ____
   Price ____
   Place ____
   Promotion ____

It is very important for businesses to address these problems in order to ensure the success of a product. Without meeting the needs and wants of customers, products will surely fail.

Once a problem has been identified, a solution needs to be found. This is where market research becomes so valuable. There are very few problems that market research can't solve. A process has been created to help solve marketing related problems. Identifying marketing problems is the first step in this process.

The Market Research Process

Here are the five steps in the market research process:

1. Define the problem
2. Obtain the data
3. Analyze the data
4. Recommend solutions
5. Act on the results

This process is pretty straightforward and can be used as a guide for solving almost any problem that may arise. Let's walk through these steps using one of the marketing problems you just wrote:

1. Define the Problem

   Below, write one of the marketing problems you generated earlier on this worksheet.

2. Obtain the Data

How do you find an answer to a problem? You can either research the problem in the library or some other source by looking up other information that has already been created. Using information that is already available is called using secondary data. Secondary data is a low-cost way to find information, but often times is outdated.

A second way to answer your marketing problem is to generate your own information by exploring the views and attitudes of customers and competitors yourself. Generating your own new and original information is called creating primary data. Primary data is fresh and new and can be set up to answer your specific questions, but is also very expensive to obtain. You have to decide if you would use primary or secondary data to answer your marketing related problem listed above.

Will you use primary data or secondary data in your search for a solution?

PRIMARY SECONDARY

How would you get this data? Would you use trade journals, Internet resources, etc., for secondary sources of information? Would you use mail surveys or phone surveys for primary information?

I would use ______________________________

3. Analyze the Data

Once you have the data collected, you need to convert it into useful information. An understanding of statistics is helpful here since statistics can provide you with valuable information of ranges, averages, etc. However, sometimes simply organizing the data into a manner that is easy to read and understand is very helpful.

How would you convert the data into useful information?

____

____

4. Recommend a Solution

Once you have converted the data into useful information, it is time to make a recommendation of your findings. Many times the answers lie in the data that you have gathered and are sometimes very clear. What kind of solution would you expect to find after analyzing the data to the marketing problem you have listed above?

____

____

5. Act on the Results

Now that you have an answer to your marketing problem, it's time to act on that problem. Perhaps your problem dealt with how to distribute your product and now you have your answers. The next step is to set up your distribution channel. Or maybe your problem dealt with how to reach your customers. Your research has shown that your customers watch a great deal of prime-time television programs. It is now time to start buying advertising time accordingly.

If action is not taken on the results of your research there is no point in doing research in the first place.

Put your research into action!

Based on the solution you listed above, what would you do to put that answer into action?

Congratulations—You have just completed the market research process!!

Summarize this activity by answering the following questions:

Most marketing problems deal with the marketing mix. Give an example of a problem marketers may face.

How do marketers identify potential problems that may face them?

Identify the five parts of the market research process and briefly describe what happens at each step.

Buying Influences

Standard

F.12.7 Describe the factors that influence a consumer's decision to buy

Directions

Understanding the factors that influence us to buy things is very important, both as consumers and as future business leaders. In this activity, you will describe what influences buying decisions by first looking at what influenced your decisions to buy something recently. You might be surprised at what you find.

1. Complete the activity sheet entitled "Personal Buying Decision Inventory" provided by your instructor. Base your answers on something you recently purchased.
2. Based on your inventory, write a brief summary report (1-2 pages, word processed) on what influences consumers (including you) to buy certain items. The inventory itself will give you all the information you need for this summary.

Student Name ______________________ Date ________________

Buying Influences

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely.

Scoring Guide

Criteria	Rating	Comments
1. You submit activity sheet "Personal Buying Decision Inventory"	S U	
2. Personal Buying Decision Inventory answers are based on something recently purchased	S U	
3. Report summarizes what influences a consumer's buying decisions	S U	
4. Report is word processed and 1-2 pages in length	S U	
5. Report contains correct spelling, grammar and punctuation	S U	

Teacher ____________________________ Date __________________

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Personal Buying Decision Inventory

You may not be aware of this, but there are many factors that influence the purchases we make. This inventory will help you discover what factors influence your decisions and the decisions of others.

The first thing you need to do in this inventory is to list an item that you recently purchased. The item should have a minimum value of $10.00. It could be a pair of shoes, any article of clothing, a CD, etc.

The item I bought was ______________________________

The item's cost was ______________________________

In order to buy that item, you probably had to choose between that product and something else. In choosing the item you did, you decided not to buy a competing item. What item did you pass up (choose not to buy) in order to purchase your item?

The item I passed up was ______________________________

This item cost ______________________________

Needs and Wants

The first thing we do as consumers is try to decide if the goods we are going to buy are things we need or simply things we want. Usually we buy things we need (food, clothing, shelter, etc.) before we buy things that we want (entertainment, travel, fashion, etc.)

The item I bought was something that I NEEDED WANTED

How do you determine if something is a need or a want? __________

____

The Product

In many cases, there are many choices in brands and styles available in almost every product on the market. Think of all of the different shoes that you could buy, or cars, or jackets. With all of these choices, it's amazing we can ever decide on anything — yet we do!

Once we have decided whether the product is something we need or simply want, the next thing we do is evaluate the product itself. We make buying choices based on the product's quality, construction, style, appearance, size, etc. When considering all these characteristics of a product, we often compare these characteristics with those of other brands or models and will ultimately choose one brand over another.

The item that I bought had the following product characteristics:

SIZE ________________________________

STYLE ________________________________

COLOR/APPEARANCE ________________________________

QUALITY ________________________________

CONSTRUCTION ________________________________

What were some of the product characteristics of the competing brands or models that you chose not to buy?

____

____

The Price

Price is a very important factor in choosing the goods and services we buy. As we just discovered, products come in all shapes and sizes, colors and styles, and qualities. If price were not a factor, we would all buy the biggest and best of everything. However, as you know, price is a factor. Usually the higher the quality, the higher the price, so we have to make choices.

Sometimes we choose to buy expensive items, sometimes mid-priced items, and other times we choose inexpensive items.

What **price factors** influenced you to buy the item you did?

____

____

What were the prices of the products you decided not to buy?

____

The Source

Source is very important when making buying decisions. Source decisions deal with who we buy from (the store, etc.) and who makes the product we buy (brand names, etc.).

Is where you buy your clothes, shoes, etc., important to you? __________
Is the brand of items that you buy usually important to you? __________

If you answered yes to either of these questions, it's safe to say that the source is important to you. This is true of many consumers and can have great influence on buying decisions.

What **source factors** influenced your decision to buy the item you did?

____

____

____

The Time

Time is something that we may overlook when discussing buying decisions. Marketers go to great lengths to make things available at a time when consumers want or need them. Think of times when you bought something because the item was on sale at that particular time or a winter jacket that you bought just before the cold wind began to blow. These are examples of the time being right to buy.

Think of times when you wanted to buy something but didn't have the money to buy just then. This is an example of the time to buy being wrong for you.

What time factors influenced your decision to buy that product when you did (why was the time right?)

____

____

Summary

This inventory gives you a good idea of what drives you to buy the things you do. Buying decisions are based on needs and wants, product characteristics, price, time, and the product's source. These factors contribute to almost every buying decision we make.

In a short report, reflect on how these factors influence your personal purchases and what role you believe these factors play in other people's buying decisions.

Directions to Teacher

1. Give students the background information they may need to understand basic consumer behavior. Glencoe's *Marketing Essentials* can be helpful here.
2. Give the students the inventory sheet and instructions. Give them time and resources to generate quality results.
3. When the inventory sheets and summaries are completed have students share some of their findings with their peers.
4. Assessment can be done by reading the reports, observing the discussion, and possibly by written exam after the lesson is complete.

Analyze Promotional Mix

Standard

F.12.8 Identify the elements of the promotional mix

Directions

Promotion is a very important part of the marketing mix. In the marketing mix, various parts are brought together to optimize the effectiveness of our marketing efforts (price, product, place and promotion).

The promotional mix is a similar concept in that we bring various components together to ensure that our promotions are the best they can be and we are reaching our customers in the most effective fashion.

Each part of the promotional mix (advertising, publicity, sales promotions, and personal selling) is designed to complement the others. Advertising creates awareness of a company or a product while publicity creates a favorable image of a business. Advertising can help in the personal sales process by informing and educating customers as to the benefits of a particular product. Sales promotions help to stimulate sales, enhance the advertising effort and support personal selling. All parts of the promotional mix need to work together.

In this activity, you will be developing an awareness of the promotional mix and its elements.

1. In a group, research and discuss the promotional mix element you have been assigned (advertising, publicity, sales promotions, and personal selling). Identify the characteristics of your element, find examples of it in the real world, and discuss its relationships to the other elements.
2. Create a chart with your promotional element identified on top. Make a short list identifying the characteristics of your type and give examples. Also, identify how the element is related to other elements in the promotional mix.
3. Give a brief presentation to the class on your promotional mix element, its characteristics and relationship to the other elements to the class.

Student Name ______________________ Date __________________

Analyze Promotional Mix Teacher Evaluation

Scoring Standard

You must achieve a rating of "satisfactory" on each criterion to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely
U= Unsatisfactory; did not cover the criterion accurately and completely.

Scoring Guide

Criteria	Rating	Comments
1. You participate in a group	S U	
2. Chart contains short list identifying the characteristics of element type and some examples	S U	
3. Chart relates assigned element of promotional mix to other elements in the mix	S U	
4. Oral presentation describes characteristics of promotional mix elements and its relationship to other elements	S U	

Teacher ___________________________ Date __________________

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Directions to Teacher

1. Give the students the needed background information pertaining to promotional mix. Stress the importance of meeting the needs and wants of consumers in marketing. Glencoe's *Marketing Essentials* is a fine source for background information.
2. Break students into groups and assign each a specific element in the promotional mix (advertising, publicity, personal selling, and sales promotion). Give students the instructions for the activity.
3. Give students time to research and discuss their elements and to create their chart.
4. Have groups give brief presentations on their promotional mix elements.
5. Create a bulletin board entitled "Promotional Mix." Put their charts on the board when presentations are complete. Lead a discussion on how the elements work together using an example they are familiar with. Snack food or soft drink companies work well.

Standard

F.12.10 Describe various methods of product distribution (logistics)

Directions

The goal of marketing is to provide consumers with products and services that meet their needs and wants. A very important component to meeting the needs and wants of consumers is putting products in a place that is convenient for them to buy.

For example, oil is of little value to most of us as it sits in an oil field in the Middle East. However, it is very important to us at the local gas station. Putting products in places where we can buy them satisfies our needs and wants.

Deciding how to get products to a place where customers need them is called distribution. A big part of distribution deals with logistics. Logistics is simply the method of how we choose to transport products form one place to another. Common logistics methods include shipping, railways, trucks and air transportation.

In this activity you will explore the different methods of transportation and the advantages and disadvantages of each type as it relates to product distribution. You will be assigned to a team for discussion and compilation of data pertaining to your assigned logistics. Follow the steps below for this activity.

1. In your group, discuss the logistics type that you have been assigned. Discuss with group members the characteristics of your transportation (logistics) type and the pros and cons of your logistics type.
2. Create a chart with your transportation type listed on top. Make a short list identifying the characteristics of your type and its pros and cons.
3. Give a brief presentation of your logistics type, its characteristics and pros and cons to the class.
4. Given certain situations, identify which logistics method you would use to transport products from one location to another. Identify why you chose the method you did.

Student Name ______________________ Date ________________

Production Distribution

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Covered the criterion accurately and completely.

No= Did not cover the criterion accurately and completely.

Scoring Guide

Criteria	**Rating**	**Comments**
1. You participate in a group project	Yes No	
2. You participate in oral presentation of characteristics, pros and cons of a specific transportation method	Yes No	
3. You identify appropriate method of distribution given various situations and identified reasons for choosing specific method	Yes No	
4. You engage in discussion of the characteristics of transportation (logistics) and its pros and cons	Yes No	
5. Chart lists type of transportation assigned	Yes No	
6. Chart lists pros and cons of assigned logistics type	Yes No	

Teacher ____________________________ Date ________________

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Directions to Teacher

1. Give students the background information they may need to understand logistics. Stress the importance of meeting the needs and wants of consumers in marketing. Glencoe's *Marketing Essentials* is a fine source for background information.
2. Break students into six groups and assign each group a specific logistics method (trucking, rail, water and shipping, express carriers, pipelines and air transportation).
3. Give students time to discuss their method of transportation and to create their chart.
4. Have groups give brief presentations on their logistics method.
5. Create a bulletin board entitled "Logistics." Put their charts on the bulletin board when presentations are complete.
6. Have students take out a blank sheet of paper. Give them numerous transportation situations and have them identify which method they would use and why they chose that method. Examples may include:
   - Wheat from the plains states to the shipping ports in Superior, Wisconsin.
   - Wheat from the docks in Superior, Wisconsin to a European country.
   - Live lobster from Maine to a restaurant in San Francisco.
   - Big screen televisions from the factory in Kentucky to the store in Dallas, Texas.
   - Oil from Alaskan oil fields to the ships waiting at the sea port.
   - One copy of a software program from California to Wisconsin—fast!

   You can think of other examples or situations that may be specific to your area.

Business Standards G

International Business

CONTENT STANDARD

Students in Wisconsin will develop the ability to participate in business transactions in both domestic and international business.

Rationale: Businesses are taking on a global focus and workers must be able to participate in both domestic and international environments in order to succeed. Therefore, students need to be able to work in a variety of business and office settings.

PERFORMANCE STANDARDS

G.12.1	Define international business
G.12.2	Explain the difference between a domestic and international company
G.12.3	Locate major trade regions of the world (see SS A.12.6, A.12.7)
G.12.4	Determine time in different parts of the world (see SS A.4.5)
G.12.5	Identify careers that are influenced by international business
G.12.6	Recognize challenges in business related to people speaking various languages
G.12.7	Identify currencies used throughout the world
G.12.8	Calculate simple currency exchange transactions
G.12.9	Identify requirements for traveling abroad

Research Domestic and International Businesses

Standards

G.12.1 Define international business

G.12.2 Explain the difference between a domestic and international company

Scenario

The Chamber of Commerce is preparing a publication called, "Meet Our Businesses: Domestic and Connected to the World" to be distributed at the Business Expo this spring. You have been asked to help the Chamber by researching two companies in your area. Your research results will be used in the publication.

Directions

In this activity, you will be learning the definitions of domestic business and international business. You will also be investigating and reporting on a local firm that conducts business only in the United States (a domestic business) and another firm which conducts business internationally or has operations in another country (an international business). You will talk with someone in the companies, research print materials and the Internet, and prepare a report or multimedia presentation about your chosen businesses.

Complete your activity by following the procedure below:

1. Choose two companies to compare and contrast from each of the lists that your instructor provides.
2. Collect data about your companies from periodicals, company publications, and the Internet.
3. Prepare a list of questions to ask managers of the companies—this will accompany your final report.
4. Interview a manager from each company using the questions which you prepared.
5. Prepare a word-processed report or multimedia presentation comparing the two companies as indicated below:
   a. Whether the company is a domestic or an international company and why
   b. The history of the companies
   c. The products the companies sell
   d. Company operations

e. If it is an international company, include information about:
   - Its transition from a domestic company to an international company
   - What nations the company does business in
   - Their export and import practices
   - Examples of ways the company adapted to other societies
   - Challenges the company has in international business

f. Other interesting information you would like to share with your classmates and the Chamber of Commerce

6. Present your report to your peers in an oral presentation.

Research Domestic and International Businesses

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Exceeds expectations
1= Meets expectations
0= Does not meet expectations

Student Name ______________________ Date ____________________

Scoring Guide

Criteria	**Rating**	**Comments**
1. Presentation is multimedia or written report	2 1 0	
2. Presentation or written report defines international business	2 1 0	
3. Presentation or written report identifies characteristics which define a domestic company	2 1 0	
4. Presentation or written report identifies characteristics which define an international company	2 1 0	
5. Presentation or written report includes history of company, products company sells and company operations	2 1 0	
6. Presentation or written report includes transition from a domestic company to an international company	2 1 0	
7. Presentation or written report includes the nations the company does business with	2 1 0	
8. Presentation or written report includes export and import practices	2 1 0	
9. Presentation or written report includes examples of ways the company adapted to other societies	2 1 0	
10. Presentation or written report includes challenges the company has in international business	2 1 0	
11. Presentation or written report contains correct spelling, grammar and punctuation	2 1 0	

Teacher ______________________________ Date ____________________

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Directions to Teacher

Definitions that your students need to know before beginning the research project:

*International business includes all of the business activities necessary for creating, shipping, and selling goods and services across national borders. The making, buying, and selling of goods and services within a country is a domestic business. (***Business in a Global Economy***, South Western, 1996)*

You will need to prepare a list of domestic companies and a list of international companies. Separate the domestic and international company names so that students will choose one from each list. You may choose to make this a partner activity.

The Chamber of Commerce can be help you prepare a list of domestic companies and international companies and contact persons. You may want to have students perform a mock interview in class before interviewing the contact person. An alternative to having the students interview managers would be to provide printed information from the various companies.

Other student activity ideas for meeting this standard:

- Participate in class discussion
- Prepare a poster that shows examples of domestic business and examples of international business
- Listen to a guest speaker representing a domestic business
- Listen to a guest speaker representing an international business
- Create a classroom display of "typically American" products and identify the home country of each product
- Compare two different retail products, one made in the U.S. and one made in another country, and relate differences in product to differences in company and country of origin
- Play "Jeopardy" type game, which includes domestic and international business as a part of the definitions category

Locate Trade Regions

Standard

G.12.3 Locate major trade regions of the world (see SS A.12.6, A.12.7)

Directions

In this activity, you will be naming and locating three major trade regions on a world map. As you complete this activity, you will be reviewing continent and country names. You will also be introduced to several "minor" trade regions. Follow the directions outlined in the scenario below.

Scenario

You are employed by EastBay, a company based in Wausau, Wisconsin. EastBay started out as a two-person operation selling shoes to athletes. Now your company's product base has expanded from shoes to all sorts of athletic apparel, shoes, and accessories. Even though the home office of EastBay is in Wausau, Wisconsin, your customers reside in the three major trade regions of the world.

On a map:

- Locate and circle the countries belonging to the North America trade region and label three countries
- Locate and circle the countries belonging to the Pacific Rim trade region and label seven countries
- Locate and circle the countries belonging to the European trade region and label seven countries

Student Name ______________________ Date ___________________

Locate Trade Regions

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Covered the criterion accurately and completely.

No= Did not cover the criterion accurately and completely.

Scoring Guide

Criteria	Rating	Comments
1. You participate in a map reading exercise pertaining to trade regions throughout the world	Yes No	
2. You locate three countries included in the North American trade region	Yes No	
3. You label three countries in the North American trade region accurately	Yes No	
4. You locate seven countries in the European trade region	Yes No	
5. You label seven countries in the European trade region	Yes No	
6. You locate seven countries included in the Pacific Rim trade region	Yes No	
7. You label Pacific Rim trade region's countries	Yes No	

Teacher ___________________________ Date ___________________

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Directions to Teacher

You will need a world map for leading this activity. Provide a blank world map for each student. An alternate activity is to have students prepare/ draw a world map of their own. If you would like to provide additional information about EastBay, go to *http://www.eastbay.com* or request a catalog at 800-826-2205.

Background trade region information needed (note: country names and borders may change):

- Countries included in the North America trade region include: Canada, United States, and Mexico.
- Countries included in the European trade region include: Albania, Austria, Belgium, Bosnia-Herzogovina, Bulgaria, Belarus, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Macedonia, Moldova, Montenegro, the Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Ukraine, and United Kingdom.
- Countries included in the Pacific Rim trade region include: Australia, Hong Kong, Indonesia, Japan, Malaysia, Bruner, New Guinea, New Zealand, The People's Republic of China, the Phillipines, Singapore, South Korea, Taiwan, and Thailand.

Class discussion could continue into locating and labeling the minor trade regions: Central America, Caribbean Basin, South America, North Africa, and Middle East. This also may be an appropriate time to introduce trade organizations like EC, EFTA, CACM, CARICOM, LAIA, Andean Pact, and ASEAN.

Other student activity ideas for meeting this standard:

- Participate in class discussion
- Listen to a guest speaker
- On a classroom world map, locate and label countries, continents, major and minor trade regions
- From a list of trading ports, match the trading port with the country.
- Label these trading ports on a map. Calculate the trade routes from port to port
- Student draws the name of a country from a box, identifies the location of that country on a world map and identifies the name of the trade region it belongs to
- Locate Wisconsin's major trade partners on a world map and indicate which trade region the country belongs to

- Divide students into groups. Assign each group one trade region and each student one country in the trade region. Students compile information about their country, and all the members of the trade-region group prepare a classroom presentation.

An alternative to using EastBay as the company listed in the scenario would be to use Land's End headquartered in Dodgeville, Wisconsin.

Time Zones

Standard

G.12.4 Determine time in different parts of the world (see SS A.4.5)

Directions

Knowledge of time zones is important in international business. In this activity, you will be using the telephone book and the Internet or a time conversion chart to convert time from one time zone to another.

Scenario

You work for Coca-Cola®. Coke® is an international company and sells soft drinks in nearly 200 countries around the world. Approximately 70 percent of your company volume and 80 percent of company profit comes from outside the United States. As a part of your job, you place many calls to the Coca-Cola® companies outside of the United States. It's tricky because your normal working hours are 9 a.m. - 5 p.m., and you must always be aware of what time it is in the country you are calling and their business hours. Sometimes you have had to call from home and in the middle of the night to reach the people you need to talk with!

You are leaving on vacation for two weeks, and a replacement will be coming in to do your job. Prepare a chart to be placed next to the phone indicating time conversions, so you can be sure that the call is being placed during business hours at the location being called. Use the telephone book, (Internet or time conversion) chart to help you.

Time Zones Chart

Country	City	Time difference	9am Monday	Noon Monday	1pm Monday	5pm Monday	Additional Notes
Canada	Toronto						
Japan	Tokyo						
United Kingdom	London						
Mexico	Mexico City						
France	Paris						
Netherlands	Amsterdam						
Brazil	Sao Paulo						
Germany	Frankfurt						
Australia	Sydney						
Spain	Madrid						
U.S.	New York City						

Other information to remember about business hours in selected countries:

Canada ______________________________

Japan ______________________________

United Kingdom ______________________________

Mexico ______________________________

France ______________________________

Netherlands ______________________________

Brazil ______________________________

Germany ______________________________

Australia ______________________________

Spain ______________________________

New York City ______________________________

Student Name ______________________ Date ____________________

Time Zones

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Exceeds expectations
1= Meets expectations
0= Does not meet expectations

Scoring Guide

Criteria	Rating	Comments
1. You list time difference for each city	2 1 0	
2. You determine time conversions for Canada	2 1 0	
3. You determine time conversions for Japan	2 1 0	
4. You determine time conversions for United Kingdom	2 1 0	
5. You determine time conversions for Mexico	2 1 0	
6. You determine time conversions for France	2 1 0	
7. You determine time conversions for Netherlands	2 1 0	
8. You determine time conversions for Brazil	2 1 0	
9. You determine time conversions for Germany	2 1 0	
10. You determine time conversions for Australia	2 1 0	
11. You determine time conversions for Spain	2 1 0	
12. You determine time conversions for New York City	2 1 0	

Teacher ______________________________ Date ____________________

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Directions to Teacher

You will need access to the information pages in the front of the phone book, a map of the world time zones, or an Internet web page to assist in this activity. A discussion of Greenwich Mean Time may be appropriate at this time.

Web pages that might be helpful:

- *http://www.thecoca-colacompany.com/*
- *www.travelworld.com*
- *http://www.travel.com.hk*
- *http://www.timeticker.com*
- *http://www.infohub.com*

Make copies of the Time Zone Chart for each student.

Produce International Business Careers Brochures

Standard

G.12.5 Identify careers that are influenced by international business

Directions

For this activity you will:

1. Research 10 careers that require international business knowledge
2. Select one career to investigate further
3. Research about the nature of work, specifically looking for:
   - duties, pros, and cons
   - educational requirements
   - income — entry and range
   - outlook — Wisconsin and nationally
   - advancement opportunities
   - personal characteristics needed
   - related careers
   - things you could do in high school to prepare for this career
4. After gathering the information prepare a brochure about this career including:
   - 10 careers associated with international business
   - nature of work including pros, cons, duties
   - educational requirements
   - income — entry and range
   - outlook in Wisconsin and nationally
   - advancement opportunities
   - personal characteristics needed
   - related careers
5. Compile the brochure using a computer software application of choice
6. Print the brochure. Make sure your brochure is organized and easy to read and uses correct spelling, grammar and punctuation.

Prompt

Next month your Future Business Leaders of America (FBLA) chapter is sponsoring a business career fair at the mall, and your class is in charge of producing brochures about international business careers. These brochures will be distributed to high school students or adults who stop at the international business careers booth.

Choose a career to investigate, register it with your instructor so there are no duplicates, and begin to research your career using a variety of resources including the Internet, Job Service, university placement information, interviews, etc. Take notes and prepare your brochure according to the guidelines.

Student Name ________________________ Date ____________________

Produce International Business Careers Brochures

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Exceeds expectations
1= Meets expectations
0= Does not meet expectations

Scoring Guide

Criteria	**Rating**	**Comments**
1. You identify 10 careers associated with international business	2 1 0	
2. Brochure contains nature of work—duties, pros and cons	2 1 0	
3. Brochure contains educational requirements—high school and post high school	2 1 0	
4. Brochure contains income—entry and range	2 1 0	
5. Brochure contains outlook—Wisconsin and nationally; advancement opportunities	2 1 0	
6. Brochure contains personal characteristics needed	2 1 0	
7. Brochure contains related careers	2 1 0	
8. Brochure uses software application for formatting	2 1 0	
9. Brochure is organized and easy to read	2 1 0	
10. Brochure is printed	2 1 0	
11. Brochure contains correct spelling, grammar and punctuation	2 1 0	

Teacher ______________________________ Date ____________________

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Directions to Teacher

Provide an example of a completed brochure so the students see an acceptable format. Students should research the career using a variety of resources which could include the Internet, Job Service, university placement information, interviews, etc. Students can prepare this brochure using desktop publishing software or paper and pen. The brochure should meet the criteria listed on the scoring guide.

Other student activity ideas for meeting this standard:

- Participate in class discussion
- Listen to a guest speaker
- Interview someone who is in an international business-related career
- Research careers that require international business knowledge on the Internet
- Give an oral presentation about a career that involves international business knowledge
- Write a research paper on an international business related career
- Job shadow a person in an international business related career
- Create a multi-media presentation about an international business related career
- Create a brochure
- View a video
- Write a job description for a particular international business career
- Discuss government service careers: ambassadors, attachés, diplomats, customs officials, and international trade specialists
- Invite business people representing international business careers to the school's career fair
- Contribute to a career opportunity fair

Challenges with Languages

Standard

G.12.6 Recognize challenges in business related to people speaking various languages

Scenario

You were recently hired as an assistant manager at DCE Multinational Company. Your company does business with 120 countries in the world, but so far no visitors from another country have visited while you have been working. In four weeks, three executives from ______________ (select a country from the list your instructor provides) will be arriving in Wisconsin. You have been told that these executives speak limited English. Plan and conduct a training session for your staff preparing them for the visit. The training session should include "Tips for Communicating with ____________ (indicate nationality)" and a role play. See the scoring guide for specific requirements.

Topics to include in the training session and role play:

- General tips for communicating with a person who speaks limited English or _____ (name of language)
- Greeting
- Use of titles and surnames
- Nonverbal language: gestures, eye contact, distance between people while speaking
- Business card usage
- Gift giving
- Dress
- General business etiquette

Directions

The ability to communicate is important in international business. In this activity, you will learn about challenges of doing business when people speak various languages by participating in a role play.

1. Select an international business destination where English is not the first language.
2. Create a tip sheet listing a minimum of seven tips for communicating with a person who speaks no or limited English.
3. Write a short (less than 5 minute) role play creating a role for both the English speaking person and non-English speaking person.

4. Your role play should include the following:
    - the use of proper title and surnames
    - introduction with business cards
    - appropriately dressed participants for country
    - general business etiquette

Student Name ______________________ Date ________________

Challenges with Languages

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Exceeds expectations
1= Meets expectations
0= Does not meet expectations

Scoring Guide

Criteria	Rating	Comments
1. Tip sheet lists a minimum of seven tips for communicating with a person who speaks no English or limited English	2 1 0	
2. Role play is written for two people	2 1 0	
3. Role play includes country's greeting	2 1 0	
4. Role play includes the use of proper title and surnames	2 1 0	
5. Role play addresses nonverbal language	2 1 0	
6. Role play uses business card	2 1 0	
7. Role play demonstrates appropriately dressed participants for country	2 1 0	
8. Role play demonstrates general business etiquette	2 1 0	

Teacher ______________________ Date ________________

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Directions to Teacher

Students will be investigating communication challenges when dealing with business people who speak other languages. This activity has been set up so students continue to research a particular country that fits business protocol, but they also investigate general tips for communicating. The students will need access to the Internet and reference materials to help them with this project. The ending products are a "Tip Sheet" and a role play.

Some sample communication tips include:

- Speak slowly, simply, and carefully. Never shout to be understood.
- Personal space requirements vary in different cultures.
- Eye contact requirements vary in different cultures.
- Be more polite and formal. Resist the temptation to use first names until invited to do so.
- Speak a few polite social words in the foreign language. It is much appreciated.
- Avoid slang as much as possible.
- Provide bilingual agendas.
- Avoid difficult words when simple words can be used.
- The visitor should be complemented and reassured of his/her ability to speak English.
- Don't talk or write about seasons or holidays. Not everyone celebrates our American holidays.
- Be a good listener and think of the other person first.

Other student activity ideas for meeting this standard:

- Participate in a class discussion.
- Listen to a guest speaker.
- Role-play accepted greetings in various countries.
- Use e-mail and the Internet to gather information about business phrases in other languages.
- Develop a tip sheet about effective communication strategies in a particular country.
- Demonstrate the free language line interpretation at 1-800-821-0301.
- Invite exchange students to class to talk about the culture shock of their first visit to America.
- Create a data base of common business expressions in various countries.
- Design a business card assuming the student is in a position in an international business. Practice presenting the card.
- Students perform role play about exchange student arriving in the United States and meeting Americans and other exchange students.

Calculate Currency Exchange Transactions

Standards

G.12.7 Identify currencies used throughout the world
G.12.8 Calculate simple currency exchange transactions

Directions

In this activity, you will identify currencies used throughout the world and calculate simple currency exchange transactions. You will record prices of a Big Mac at a McDonald's restaurant in your local area and the price of a Big Mac in ten other countries using the local currencies. You will also use a currency exchange chart or web site and convert the price into U.S. currency. As you do this activity and read about McDonald's, you will record unique menu items available at McDonald's restaurants in the ten countries.

Scenario

You work for McDonald's. At today's employee meeting, your boss talked about the large number of McDonald's restaurants in operation all over the world. You were surprised when you heard that there are 24,500 restaurants in 115 countries. You've always believed that McDonald's is "your kind of place," but you wonder if the McDonald's in those 115 countries are like the one in your hometown. Are the Big Macs the same price? Do they serve the same kind of food? Now's the time to find out!

Using the Internet, information from the McDonald's corporate offices, or information supplied by your teacher, complete the chart indicating prices in local currency of a Big Mac for the ten countries listed on the chart supplied by your instructor. As you are investigating McDonald's, record any information you may find about menu offerings in the ten countries.

By using the Internet or the currency exchange chart supplied by your teacher, determine the currency exchange rate for each of the ten countries and record it on the chart. Convert the prices of the menu items into U.S. currency and record the conversion on the chart.

As you do your research, indicate unique items available at McDonald's in various parts of the world.

Calculate Currency Exchange Transactions Chart

Country	Local Currency	Price of Big Mac (with tax)	Exchange Rate	Price Converted to U.S. $$
Japan				
England				
Taiwan				
Canada				
Australia				
Belgium				
Brazil				
Denmark				
Italy				
Russia				

Country	Unique Menu Items
Japan	
England	
Taiwan	
Canada	
Australia	
Belgium	
Brazil	
Denmark	
Italy	
Russia	

Student Name ______________________ Date ________________

Calculate Currency Exchange Transactions

Scoring Standard

You must achieve a rating of "yes" on each criterion to demonstrate competence.

Rating Scale

Yes= Covered the criterion accurately and completely.

No= Did not cover the criterion accurately and completely.

Scoring Guide

Criteria	Rating	Comments
1. Record includes price at hometown McDonald's	yes no	
2. Record includes local currency in ten listed countries	yes no	
3. Record includes prices of Big Mac in the country's currency	yes no	
4. Record includes current rate of exchange for each country	yes no	
5. Calculation includes conversion to U.S. dollars for Japan	yes no	
6. Calculation includes conversion to U.S. dollars for England	yes no	
7. Calculation includes conversion to U.S. dollars for Taiwan	yes no	
8. Calculation includes conversion to U.S. dollars for Canada	yes no	
9. Calculation includes conversion to U.S. dollars for Australia	yes no	
10. Calculation includes conversion to U.S. dollars for Belgium	yes no	
11. Calculation includes conversion to U.S. dollars for Brazil	yes no	
12. Calculation includes conversion to U.S. dollars for Denmark	yes no	

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Criteria	**Rating**	**Comments**
13. Calculation includes conversion to U.S. dollars for Italy	yes no	
14. Calculation includes conversion to U.S. dollars for Russia	yes no	

Teacher ________________ Date ____________

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Directions to Teacher

The student should use the Internet or contact the McDonald's corporate office to research the scenario. Depending on your timeline, you may want to give the students the currency and price information to fill in the chart, instead of having the students research this. Conversions should then be completed. The information included below was compiled by McDonald's in November 1997.

Students will need calculators or a currency exchange web site to complete this activity.

Helpful McDonald's websites and phone numbers:

- McDonald's: (630) 623-3000
- *http://www.McDonald's.com*
- *http://www.mcdonalds.com/corporate/franchise/outside/contacts/index.html* — lists franchise opportunities and e-mail addresses for foreign McDonald's

Currency conversion sources:

- *http://www.rubicon.com (go to practice areas)*
- *http://www.oanda.com (go to classic currency converter)*
- *http://www.infoseek.com*
- *http://www.lycos.com*
- *http://www.xe.net/currency*
- *http://www.usatoday.com*
- *http://www.dogpile.com*

Other student activity ideas for meeting this standard:

- Participate in class discussion.
- Listen to a guest speaker from the banking industry.
- Listen to a guest speaker from McDonald's.
- Research currency used in a country.
- Create a chart for additional McDonald's prices and exchanges to be recorded.
- Look at foreign coins and currency.
- Obtain currency information from an exchange student.
- Give an oral presentation about a country's currency.
- Create a display of foreign currency.
- Create a multimedia presentation about countries and their currencies.
- Prepare an expense report simulating a business trip to another country completing the currency exchanges required.
- Prepare a chart or data.

Currency Exchange Transactions Chart

Country	Local Currency	Price of Big Mac (with tax)	Exchange Rate	Price Converted to U.S. $$
Japan	Yen	294.00		
England	Pound Sterling	1.84		
Taiwan	Taiwan Dollar	68.00		
Canada	Canadian Dollar	2.79		
Australia	Australian Dollar	2.60		
Belgium	Belgian Franc	109.00		
Brazil	(New) Cruzeiro	3.10		
Denmark	Danish Kroner	19.75		
Italy	Lire	4500.00		
Russia	Rubles	11,000.00		

Country	Unique Menu Items
Japan	
England	
Taiwan	
Canada	
Australia	
Belgium	
Brazil	
Denmark	
Italy	
Russia	

Requirements for Traveling Abroad

Standard

G.12.9 Identify requirements for traveling abroad

Directions

The world is getting smaller, and it is likely that you will be traveling to a foreign country sometime in your lifetime. For this activity:

1. Read the scenario below and choose a country to research and learn about its border regulations for business and pleasure travelers.
2. Write a brief summary report about the country's border regulations.
3. Fill out a passport application.
4. Compile a list of "What a U.S. Citizen Needs to Do Before Visiting ________ (name of country)."
5. Word process all documents (except the passport application).

Scenario

You are an employee of the DCE Multinational Company. You have never been out of the United States, but today your boss told you that you will be spending three weeks in the country of ____________doing business. (Fill in the name of the country after you have drawn one from the list your teacher provides.)

You're pretty excited . . . The trip is scheduled for six months from now, but you know that there are a lot of things you need to do. Consult the Internet, read travel documents, or talk to a travel agent to find out what the requirements are for entry and exit from your country. Do you need a passport? How do you apply for one, and what do you need to get one? What is a certified birth certificate? How much does a passport cost? Are there special vaccinations or shots required? Is a visa required? Are there any travel warnings posted by the State Department at this time?

Your job is to complete research, fill out a passport application form, and prepare a list of, "Ten Things a U.S. Citizen Needs to Do or Know Before Visiting ______" (name of country) to share with your colleagues who will be traveling with you.

Six months will go by quickly, and soon you'll be packing for your trip. You'll be ready!

Student Name ______________________ Date __________________

Requirements for Traveling Abroad

Scoring Standard

You must achieve a rating of at least "1" on each criterion to demonstrate competence.

Rating Scale

2= Exceeds expectations
1= Meets expectations
0= Does not meet expectations

Scoring Guide

Criteria	Rating	Comments
1. Report includes country's border regulations for both pleasure and business travelers	2 1 0	
2. Passport application is filled out completely	2 1 0	
3. Passport application is accompanied by all proper attachments	2 1 0	
4. List entitled "What a U.S. Citizen Needs to do Before Visiting ________" includes at least 10 travel requirements for selected country	2 1 0	
5. List is word processed and contains proper grammar, spelling and punctuation	2 1 0	

Teacher ____________________________ Date __________________

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Directions to Teacher

Prepare a list of countries that you would like your students to explore. Have students randomly draw the name of a country. Each student will need a passport application which can be downloaded from the Internet at *http://travel.state.gov/download_applications.html.*

You will also need to have available sources of information about appropriate visa or passport requirements for the countries. As an introduction to this activity, invite a travel agent to speak to the students about international travel and requirements.

Students will need the definition for a certified birth certificate.

These additional Internet sites may be helpful:

- *http://travel.state.gov/passport_services.html*
  (defines passport and visas; can download passport application)
- *http://travel.state.gov/foreignentryreqs.html*
  (gives information about requirements for entry into countries)
- *http://travel.state.gov/travel_warnings.html*
  (posts warnings about traveling to particular countries)

Note: these Internet sites were available 5/99 and may have changed.

Other student activity ideas for meeting this standard:

- Participate in class discussion.
- Listen to a travel agent guest speaker.
- Share current events and personal experiences related to travel.
- Create a brochure for travelers entering a chosen country listing requirements to enter and exit, tourist information, language tips, and what to pack.
- Complete a travel word scramble.
- Search the Internet for travel advisory sites.
- Role-play a situation where a business person is visiting a specific country and indicate during the role play the documents needed.
- Give a presentation describing the role of U.S. Customs and customs agencies of the world.

Business Standards H

Principles of Management

CONTENT STANDARD

Students in Wisconsin will select and analyze appropriate information from the business function areas such as marketing, finance, accounting, production, and personnel of business to make informed management decisions.

Rationale: Students must have the ability to know where to find information needed to make decisions. The knowledge of different function areas of business and what data can be obtained from these areas is essential for students to use in both personal and business management decisions.

Standards Covered in this Unit

H.12.1 Identify the function areas of a business

H.12.2 Identify and explain a business organizational chart

H.12.3 Become aware of career opportunities in business organization/management, and understand the technical skills, knowledge, education levels, and attitudes needed

Functions of Business

Standard

H.12.1 Identify the function areas of a business

Directions

There are many things that go on in business every day. By discovering what the functions of business are, you may uncover opportunities in business that you never knew existed. For this assessment, complete the following steps:

1. You will be assigned one of the function areas of business (management, marketing, finance, etc.) to research. Research the various facets of the function area using a variety of resources including class and library materials or the Internet. Discover the following information about your particular function area:
   - What is the purpose of that function area in a business?
   - What are some of the type of jobs and tasks that can be found in that function area?
   - How does this area relate to the other function areas?
   - What is the career outlook for this function area?
   - What are examples of companies (or jobs) locally that relate to this area of business?
2. Summarize the information you gathered in a one- to two-page report.
3. Share your findings in a class discussion. Participate in the creation of a business function wheel with your classmates.

Student Name ______________________ Date ____________________

Functions of Business

Scoring Standard

You must achieve a rating of at least "2" or "yes" on each criterion to demonstrate competence.

Rating Scale

3= Work exceeds criterion; is of the highest quality, no revisions necessary
2= Work meets criterion; some revision necessary
1= Work meets most of criterion; is adequate, but considerable rework or revision is necessary
0= Work does not meet criterion

Yes= Criterion is completed

No= Criterion is not completed

Scoring Guide

Criteria	Rating	Comments
1. Report includes the purpose of the function area in a business	2 1 0	
2. Report includes a list of jobs and tasks in the function area	2 1 0	
3. Report includes a description of how this area relates to the other function areas	2 1 0	
4. Report includes an evaluation of the career outlook for the function area	2 1 0	
5. Report includes examples of companies (or jobs) locally that relate to the function area	2 1 0	
6. Report is one to two- pages and word processed	2 1 0	
7. Report includes correct spelling, grammar and punctuation	2 1 0	
8. You present information orally to peers	yes no	
9. Oral presentation is clear and concise	yes no	

Teacher ______________________________ Date ____________________

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Directions to Teacher

1. Assign each student one of the function areas of marketing: management, finance, accounting, etc.
2. Review the directions and scoring guide. Allow the necessary time and resources they need to generate quality results.
3. Collect the results and create a "wheel" mural showing each function of business in relationship to the others. You may want to put a label in the middle of the mural called "business" and have spokes to the other function area to show the relationships. Put the student work on the wheel.
4. Have a student volunteer from each function area share their ideas with their peers. Have other students in the same area share any additional ideas to paint a clear picture of each function area. Complete one function area at a time until the entire wheel is complete.
5. Illustrate some of the ways that the function areas are connected to each other through examples or anecdotal stories.

Explain an Organizational Chart

Standard

H.12.2 Identify and explain a business organizational chart

Prompt

Organizational charts are very useful in business. They give businesses the opportunity to define the chain of command, help new employees become familiar with the organization, and identify problems or opportunities in the way the business is structured.

Directions

In this activity you will create an organizational chart of a local business and then evaluate the chart.

1. Your teacher has given you some background information covering organizational charts, their purposes and characteristics. Using that information as a guide, choose a business and create an organizational chart. The business could be one where you work, a co-op work site, a place where your parents work, etc.
2. Diagram the organization of the business as you see it. It may be necessary to consult someone from that business to obtain information to help you. Make sure your chart meets the requirements on the attached scoring guide.
3. Note the answers to the following questions on your chart or a separate piece of paper:
   - Is the organizational structure horizontal or vertical?
   - What, in your opinion, are the advantages and disadvantages of such a structure?
   - What would you change about this business' organizational structure and why?
4. Submit your organizational chart, the answers to the following questions in step 3, and the scoring guide to your teacher for feedback and evaluation.

Student Name ______________________ Date ______________

Organizational Chart

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Work exceeds criterion; is of the highest quality, no revisions necessary
2= Work meets criterion; some revision necessary
1= Work meets most of criterion; is adequate, but considerable rework or revision is necessary
0= Work does not meet criterion

Scoring Guide

Criteria	Rating	Comments
1. Chart identifies "chain of command"	3 2 1 0	
2. Chart is complete	3 2 1 0	
3. Report identifies the kind of organizational structure	3 2 1 0	
4. Report includes at least two advantages of the structure	3 2 1 0	
5. Report includes at least two disadvantages of the structure	3 2 1 0	
6. Report identifies possible areas for business structure improvement	3 2 1 0	
7. Report and chart include correct spelling, grammar and punctuation	3 2 1 0	
8. Report and chart are professional in appearance	3 2 1 0	

Teacher ______________________ Date ______________

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Directions to Teacher

1. In a lecture or class discussion, give students background information on organizational charts. Be sure to identify the characteristics of horizontal and vertical organizations, the strengths and weaknesses of each type, and staff and line positions.
2. Show the students a blank organizational chart (using an overhead or hard copies). Ask students to identify where they would place the president of the company, the general laborers, the supervisors, etc.
3. Review the directions and scoring guide for the assessment.

Research Career Choices

Standard

H.12.3 Become aware of career opportunities in business organization/management, and understand the technical skills, knowledge, education levels, and attitudes needed

Prompt

Deciding what you want to do after high school is not easy. Perhaps you have thought about being a leader, a manager, or even operating your own business. There are certain characteristics, knowledge, and skills that successful managers have. An understanding of these qualities can give you the edge you need to be successful.

Directions

In this activity you will explore careers in management and identify skills necessary to be successful in those careers.

1. Brainstorm a list of five to ten management-level occupations that appear interesting to you. Use resources that are available in your guidance office, library or on the Internet.
2. From the list, choose one occupation you would like to pursue in more depth.
3. Research your career choice. Find out the following information:
   - technical skills necessary for the career
   - kind of knowledge necessary for the career
   - education required for the career
   - attitudes that make someone successful in the career
4. Create a brochure presenting information about your career choice. Make sure you include all of the information listed on the scoring guide.
5. Submit your brochure and the scoring guide to your teacher for evaluation.

Student Name ______________________ Date ___________________

Careers Brochure

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Work exceeds criterion; is of the highest quality, no revisions necessary
2= Work meets criterion; some revision necessary
1= Work meets most of criterion; is adequate, but considerable rework or revision is necessary
0= Work does not meet criterion

Scoring Guide

Criteria	**Rating**	**Comments**
1. Brochure clearly describes the chosen career and provides examples of job titles and possible places of employment	3 2 1 0	
2. Brochure includes the technical skills required for the career	3 2 1 0	
3. Brochure includes the kind of knowledge necessary for the career	3 2 1 0	
4. Brochure includes a list of attitudes necessary for the career	3 2 1 0	
5. Brochure includes the education required for the career	3 2 1 0	
6. Brochure is professionally presented	3 2 1 0	
7. Brochure contains correct spelling, grammar and punctuation	3 2 1 0	

Teacher ____________________________ Date __________________

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Directions to Teacher

1. Review the directions and scoring guide. If possible, obtain sample career brochures from your Guidance Office. Depending on the resources available, students could publish or hand write their brochures.
2. After the brochures are complete, have students share their findings. Have students identify some of their findings as they relate to attitudes, skills, knowledge and education. Record these traits on the board and generate a list. Reduce the list to avoid duplicates and have students record the list and discuss these traits. Having students perform a self-assessment of these characteristics and traits may be helpful and interesting to them.
3. You could create a Management Careers display by posting the brochures on a class bulletin board.
4. (Optional) Have a local business manager come to class to discuss his/her career with the class. Prior to his/her arrival send a copy of the class list that was generated and ask the speaker to share his/her thoughts on this list.

Business Standards I

Principles of Law

CONTENT STANDARD

Students in Wisconsin will apply the basic legal principles to their roles as citizens, consumers, and employees.

Rationale: The knowledge of law is essential in today's society. Whether the law pertains to an individual or a business, students must understand legal principles in order to be a productive citizen and make responsible decisions that protect the individual and society at large.

PERFORMANCE STANDARDS

I.12.1 Interpret and apply legal principles to business and personal situations

I.12.2 Differentiate and contrast felonies and misdemeanors and their penalties

I.12.3 Understand rights and responsibilities when leasing property

I.12.4 Identify laws governing credit and credit reporting

I.12.5 Demonstrate an understanding of legal forms used in business transactions

I.12.6 Understand laws that govern personal investments and estates

I.12.7 Identify agencies protecting consumer rights

I.12.8 Become aware of career opportunities in law-related areas, and understand the technical skills, knowledges, education levels, and skills needed

Interpret a Court Case

Standards

I.12.1 Interpret and apply legal principles to business and personal situations

I.12.2 Differentiate and contrast felonies and misdemeanors and their penalties

Directions

1. Read the case described below.
2. Research the legal principles that apply to the business and personal situations in the case. Prepare a written report on the case. Make sure you meet all of the requirements on the scoring guide.
3. Participate in a role play of the case. You will be assigned one of the following roles: Sam, Sam's manager, owner of the pizza place, Sylvia, a lawyer for one of the parties, the judge, or a juror.

Scenario

Sam is employed at a local pizza establishment. Sam's responsibilities include taking telephone orders and making pizzas. However, today the delivery person called in sick and Sam's manager is swamped so Sam is asked to deliver some pizzas using the manager's car. Sam has three orders to deliver immediately (the orders are back ordered already). Sam's manager says to make the deliveries "pronto" and return as fast as possible. Sam is instructed to do whatever he can to get these pizzas delivered and return quickly.

Sam rushes out the door with the three pizzas. Sam is unfamiliar with the manager's car. While enroute, Sam sees a sign that indicates a particular street is detoured. Sam knows the workers are not working now anyway and, if Sam takes the detour, the detour will add 15 minutes onto the trip. Sam ignores the detour sign and speeds (30 mph over the limit) through the road work. In Sam's haste, Sam hits a car backing out of a driveway. The driver of the car, Sylvia, is seriously injured and ends up in critical condition at the hospital. Sam's manager's car (a brand new Ford Explorer) is totalled.

Eventually, Sylvia is released from the hospital after amputation of her left leg. However, she will not be able to return to work as a flight attendant. Sam is fired from the job.

Student Name ____________________ Date ________________

Case Report Scoring Guide

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Missing, incorrect or inappropriate information

Scoring Guide

Criteria	Rating	Comments
1. Case report includes a clear statement of the case	3 2 1 0	
2. Case report cites relative laws to the issue	3 2 1 0	
3. Case report includes a recommendation	3 2 1 0	
4. Case report includes the application of laws to the situation supporting the recommendation according to the law regarding misdemeanors or felonies	3 2 1 0	
5. Case report includes a conclusion	3 2 1 0	
6. Case report cites resources used	3 2 1 0	

Teacher ________________________ Date ________________

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Directions to Teacher

1. Review the case with the class. Allow time for students to research the case individually or in small groups. Assign the written case report.
2. Assign students the role of Sam, Sam's manager, owner of the pizza place, Sylvia, lawyers for each party, judge and jurors. Conduct a role play of the trial, make a ruling and assess the penalties. Discuss the following questions:
   - Is Sam at fault? Can Sam take recourse against the pizza manager for being fired?
   - Can Sylvia sue Sam? Can Sylvia sue the pizza manager? Can Sylvia sue the owner of the pizza restaurant?
   - Can the district attorney bring felony charges against Sam?
   - What type of agency relationship exists in this scenario?
   - What penalties and/or remedies can be assessed to all parties?

Standards

I.12.3	Understand rights and responsibilities when leasing property
I.12.5	Demonstrate an understanding of legal forms used in business transactions

Prompt

You have just graduated from school and are now employed full time. You've decided to rent your own apartment. Using the classified section of a newspaper or the Internet, locate a property that is available to lease.

Directions

1. Write down or make a copy of the advertisement.
2. Think about the kind of information you would want to know about the lease and the lease termination. Create a checklist of items to be considered when leasing property.
3. Find answers to the items on your checklist regarding the apartment lease. Record the answers on your checklist.
4. Compile the following information: the ad for the apartment, the checklist, and the checklist answers. Submit them to your instructor (with the scoring guide) for evaluation.
5. Share your findings with the class.

Student Name ______________________ Date ________________

Leasing an Apartment Checklist

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations
0= Missing, incorrect or inappropriate information

Scoring Guide

Criteria	**Rating**	**Comments**
1. You include an ad for an apartment available for lease	3 2 1 0	
2. You compile a checklist of questions to ask when leasing an apartment	3 2 1 0	
3. You identify the laws related to property rental	3 2 1 0	
4. You identify the options for termination of the lease	3 2 1 0	
5. You discuss the lease agreement itself; including down payment, monthly payments, and penalties	3 2 1 0	
6. You identify components of the rental contract	3 2 1 0	

Teacher ____________________________ Date ________________

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Directions to Teacher

1. Contact a rental property agency and ask a landlord to make a presentation to the class.
2. Provide sample lease agreements for students to examine.
3. If possible, have the class visit a property management agency and actually simulate a visit of a potential tenant.
4. After class discussion and individual student research, have students share their findings and checklists.

Interpret Credit Reports

Standards

I.12.4 Identify laws governing credit and credit reporting
I.12.7 Identify agencies protecting consumer rights

Directions

For this activity, you will demonstrate your knowledge of credit reports.

1. Read through the case described in the scenario.
2. Research information to help you respond to the situation described in the case. Specifically:
   - Explain the Fair Credit Reporting Act
   - Identify a credit reporting agency
   - Identify the steps to remedy an error on a credit report
   - Identify the responsibilities creditors have to customers
3. Prepare an oral report on your findings. Tell how you would handle the situation described in the case study. Make sure your oral report meets the requirements on the scoring guide.

Scenario

You currently have a 1990 Taurus and because you've received a nice pay raise at your job, you're ready to upgrade your vehicle. (Plus, the Taurus is beginning to cost you money in repairs!) You've applied for a loan for a new vehicle and just received a telephone call from your financial institution saying that you are denied the loan because you have a bad credit report. Apparently, the credit report shows that your Target credit card has an outstanding balance of $485 and that you have six months of late payments. You've always paid your Target bill on time, in fact you made a payment last month! You are unaware of any late payments let alone an outstanding balance!

Student Name ______________________ Date ___________________

Oral Report Scoring Guide

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations
0= Missing, incorrect or inappropriate information

Scoring Guide

Criteria	Rating	Comments
1. You explain the Fair Credit Reporting Act	3 2 1 0	
2. You identify a credit reporting agency	3 2 1 0	
3. You identify steps to remedy the error on the credit report	3 2 1 0	
4. You identify the responsibilities creditors have to the customer	3 2 1 0	
5. Presentation is well organized	3 2 1 0	
6. Presentation is professionally presented	3 2 1 0	

Teacher ___________________________ Date ___________________

BEST COPY AVAILABLE

Directions to Teacher

1. Review the directions and scoring guide.
2. Provide local resources to assist students in researching responses to the scenario.
3. Set up oral reports. Use the scoring guide to assess the reports.

Invest an Inheritance

Standard

I.12.6 Understand laws that govern personal investments and estates

Directions

1. Read through the situation described in the Scenario.
2. Research the laws that govern personal investments and estates as they relate to this situation. Identify several options for investing your money. If possible, interview an investment planner for suggestions.
3. Choose an investment strategy for your money. Prepare a visual to diagram your decision. Share your research and decision in an oral report to the class. Make sure you meet all of the critera on the scoring guide.

Scenario

Your Great Aunt Matilda has just passed away. In her will she left you, her favorite niece/nephew, $15,000. You decide that you should invest the inheritance. How much of the inheritance should you invest? Where will you invest it? What laws govern your decisions?

Student Name ______________________ Date ________________

Investment Presentation

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations
0= Missing, incorrect or inappropriate information

Scoring Guide

Criteria	Rating	Comments
1. You explain the investment decisions in the scenario	3 2 1 0	
2. You use a visual to diagram the investment decisions	3 2 1 0	
3. Visual is well organized and clear	3 2 1 0	
4. You provide a rationale for your decisions	3 2 1 0	
5. You support your decision by citing appropriate laws related to investment	3 2 1 0	
6. You present your information in a professional manner	3 2 1 0	

Teacher __________________________ Date ________________

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Directions to Teacher

1. Review the directions and scoring guide.
2. If possible, contact an investment planner(s) to serve as a mentor for the students. Arrange for a banker to speak to the class about estate planning.
3. Allow time for research. Show several types of visuals that students could use to present their information.
4. Set up oral reports. Evaluate the reports using the scoring guide.

Create a Job Description

Standard

I.12.8 Become aware of career opportunities in law-related areas, and understand the technical skills, knowledges, education levels, and skills needed

Directions

For this activity, you will develop a job description for a law related career.

1. With your class, brainstorm a list of law-related careers. Choose one of the careers to investigate on your own.
2. Research the following information:
   - Educational requirements
   - Technical skills required
   - Knowledge required
   - Any additional skills required
   - Typical working environment
   - Salary range
3. Create a job description for the career. Make sure to include all of the components on the attached scoring guide.

Scenario

You work in the human resources department and your supervisor has informed you that your next project will be to update the job descriptions of the employees. As you begin your work, you notice that there are a few job descriptions missing from the current manual within your legal department. Therefore, you must create a job description about the missing law-related positions.

Student Name ______________________ Date ________________

Job Description

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations
0= Missing, incorrect or inappropriate information

Scoring Guide

Criteria	Rating	Comments
1. Job description follows predetermined format	3 2 1 0	
2. Job description contains educational requirements for the position	3 2 1 0	
3. Job description contains technical skills required for the position	3 2 1 0	
4. Job description contains knowledge required for the position	3 2 1 0	
5. Job description contains additional skills needed for the position	3 2 1 0	
6. Job description contains information regarding a typical working environment for the position	3 2 1 0	
7. Job description contains the salary range for the position	3 2 1 0	

Teacher ___________________________ Date ________________

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Directions to Teacher

Provide examples of various job descriptions so the students can utilize an acceptable format.

Business Standards J

Interpersonal and Leadership Skills

CONTENT STANDARD

Students in Wisconsin will demonstrate interpersonal teamwork and leadership skills necessary to function in multicultural business settings.

Rationale: In order to be successful, workers need to work independently and with others, demonstrate initiative, and work efficiently in a variety of business environments.

PERFORMANCE STANDARDS

J.12.1 Demonstrate appropriate interpersonal skills when working with others

J.12.2 Identify stereotypes and discriminatory behaviors that could impact personal and organizational success

J.12.3 Demonstrate ability to give and receive constructive criticism

J.12.4 Interact effectively with people from various backgrounds

J.12.5 Organize and participate in a discussion (see LA C.8.3, C.12.3)

J.12.6 Demonstrate courteous attention to speakers

J.12.7 Demonstrate ability to work as part of a team

J.12.8 Demonstrate the ability to work independently

J.12.9 Give examples of how nonverbal messages have different meanings in various cultures

J.12.10 Demonstrate delegation skills

J.12.11 Define ethics

J.12.12 Explain why motivation, leadership, and trust are important to a team

J.12.13 Compare and contrast alternative leadership styles

J.12.14 Explain the importance of consumer trust for the successful conducting of business

Standards

J.12.1 Demonstrate appropriate interpersonal skills when working with others

J.12.3 Demonstrate ability to give and receive constructive criticism

Directions

For this activity you will work in groups of four. Your group will conduct four separate role plays. For each role play you will play one of the following roles: employee, supervisor, employee evaluator, or supervisor evaluator. Make sure everyone has the chance to play all four roles.

1. Decide who will play which role for the first round. Review the appropriate scoring guide for your role if you are the employee or supervisor. Evaluators—make sure you have a copy of the scoring guide to evaluate the role play. One of the evaluators should begin by reading the scenario out loud, then the supervisor and the employee should role-play a resolution to the situation. The employee evaluator should use the appropriate scoring guide to evaluate the employee. The supervisor evaluator should use the appropriate scoring guide to evaluate the supervisor. After the role-play is complete, discuss the role plays and the ratings provided by each of the evaluators on the scoring guides.
2. Change roles and repeat the activity using the second scenario. Continue until everyone has had a chance to play all the roles.

Scenarios

Scenario 1

The supervisor reviewed the information the employee sent out to all of the company's customers yesterday. The supervisor realizes that the employee typed the incorrect date on a flyer for an upcoming event.

Scenario 2

The supervisor just received a phone call from a customer indicating that an order that was sent out yesterday was incomplete. The employee did not include all of the parts the customer ordered. This is the third time this week that an incorrect order has been shipped by the employee.

Scenario 3

All of the annual reports just went to print. The supervisor has just discovered that one of the financial report pages was left out when the employee typed it.

Scenario 4

It's been crazy at the store all morning because of the big sale. The shelves are a mess and need to be tidied. The supervisor has asked the employee to pick up the area, but nothing has happened.

Student Name ______________________ Date ________________

Supervisor Checklist

Scoring Standard

You must achieve a "yes" rating on 6 out of the 9 items on the scoring guide to demonstrate competence.

Scoring Guide

Criteria	Rating	Comments
1. You identify the problem/situation	yes no	
2. You are courteous to others	yes no	
3. You use nonverbal cues	yes no	
4. You clarify when something is unclear to others	yes no	
5. You seek clarification when something is unclear to yourself	yes no	
6. You listen to others' opinions	yes no	
7. You give suggestions to others on ways to show improvement	yes no	
8. You use eye contact	yes no	
9. You speak clearly and concisely	yes no	

Supervisor Evaluator _________________________ Date ___________________________

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Student Name ______________________ Date __________________

Employee Checklist

Scoring Standard

You must achieve a "yes" rating on 6 out of the 9 items on the scoring guide to demonstrate competence.

Scoring Guide

Criteria	Rating	Comments
1. You identify the problem/situation	yes no	
2. You are courteous to others	yes no	
3. You use nonverbal cues	yes no	
4. You clarify when something is unclear to others	yes no	
5. You seek clarification when something is unclear to yourself	yes no	
6. You listen to others' opinions	yes no	
7. You give suggestions to others on ways to show improvement	yes no	
8. You use eye contact	yes no	
9. You speak clearly and concisely	yes no	

Employee Evaluator ______________________ Date ______________________

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Directions to Teacher

1. Discuss with your students the appropriate interpersonal skills when working with others. Also, discuss the ability to give and receive constructive criticism. You may want to provide examples for your students.
2. Divide students into groups of four. Review the directions and scoring guides. Allow time for role plays.

Design a Stereotype or Discriminatory Behavior Role Play

Standard

J.12.2 Identify stereotypes and discriminatory behaviors that could impact personal and organizational success

Directions

For this activity you will write a role play that includes a stereotype or discriminatory behavior. You will also identify stereotypes and discriminatory behaviors and the impacts these factors have on personal and organizational success.

1. Write a Role Play

   Write a role play in which a stereotype or behavioral discrimination is taking place. Show the impact of the stereotype on the person or the organization. Write your role play in script form. You may use up to four characters. When your role play is acted out, it should be about two minutes in length.

2. Act Out the Role Play

   Act out your role play. Cast the parts using other students in the class. Practice your role play and make sure it is about two minutes in length. Perform your "polished" role play for the class.

3. Identify Stereotypes and Discriminatory Behaviors

   Watch the role plays performed by other students. Identify what stereotype or discriminatory behavior was acted out. Answer the following questions for each role play:

   - What is the stereotype or discriminatory behavior being role-played?
   - What impact does this stereotype or discriminatory behavior have on the individual or organization?

Student Name ______________________ Date __________________

Design a Role Play

Scoring Standard

You must achieve at least 12 points on this scoring guide to demonstrate competence. No criterion can be rated "0".

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	Rating	Comments
1. Role play demonstrates a stereotypical or discriminatory behavior	3 2 1 0	
2. Role play shows the impact of the stereotype or discriminatory behavior	3 2 1 0	
3. Role play is developed in script form	3 2 1 0	
4. Role play is about 2 minutes in length	3 2 1 0	
5. Role play is acted out including casting of parts	3 2 1 0	
6. You identify the stereotypes or discriminatory behavior in other role plays	3 2 1 0	
7. You identify the impact of the stereotypes or discriminatory behaviors in other role plays	3 2 1 0	

Teacher ___________________________ Date __________________

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Directions to Teacher

Prior to this activity, discuss various stereotypes and discriminatory behaviors seen in our society. Also, discuss how these factors impact personal and organizational success.

Interview a Foreign Exchange Student

Standards

J.12.4 Interact effectively with people from various backgrounds
J.12.5 Organize and participate in a discussion (see LA C.8.3, C.12.3)
J.12.6 Demonstrate courteous attention to speakers
J.12.7 Demonstrate ability to work as part of a team

Directions

Plan

1. Interview a foreign exchange student who is currently attending your school. Find out what country the student is from.
2. Each person on the team must develop three to five questions for the interview. The questions should relate to business/industry in the student's country.
3. As a group, arrange all of the questions in an organized format. For example, put those questions which relate to one another together.

Interview

1. Set up the interview time and place with the foreign exchange student. Your entire group must be present at the interview and it must be conducted in a face-to-face setting.
2. Interview the student using your question list. At all times you should be demonstrating courteous attention to speaker (interviewee or group members). Remember, as you are listening to answers, you want to share similarities or differences in our own business practices. This may also trigger additional questions to ask the foreign exchange student.

Post-interview

1. As a group summarize your findings into a one-page paper.
    - Reflect on your experience interacting with someone from a different background
    - Suggest ways to increase the likelihood of clear communication with someone from a different background
    - Describe what you learned in terms of similarities and differences of business practices in the U.S. and the interviewee's native country
    - Comment on the effectiveness of your group in this activity. Give examples of how your group functioned effectively and ineffectively. Suggest ways to improve your effectiveness.
2. Conduct a peer evaluation of one other member of your group. Use the Peer Evaluation Scoring Guide.

3. Submit your summary paper, a copy of your group's interview questions after they were compiled together, the individual questions developed by each student, the Peer Evaluation Scoring Guides, and the Project Scoring Guide to your instructor for evaluation.

Team Member's Name ______________________ Date ____________

Peer Evaluation

Scoring Standard

The student must achieve a "yes" rating on at least five of the criteria to demonstrate competence.

Scoring Guide

Criteria	Rating	Comments
1. Team member participated with the group in organizing questions into an interview format	yes no	
2. Team member listened to other members of the group during group times	yes no	
3. Team member participated in the interview	yes no	
4. Team member listened as interviewee spoke	yes no	
5. Team member demonstrated courteous attention to the foreign exchange student	yes no	
6. Team member participated in developing the written summary	yes no	
7. Team member did your part to successfully complete the project	yes no	

Your Name ______________________ Date ____________

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Student Name ________________________ Date ____________________

Project Scoring Guide

Scoring Standard

Your group must achieve at least 16 points on this scoring guide to demonstrate competence. No items can receive a "0" rating.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	Rating	Comments
1. You develop three to five questions to ask the foreign exchange student	3 2 1 0	
2. Your group compiles your questions into a cohesive interview	3 2 1 0	
3. Summary includes a reflection on interacting with someone from a different background	3 2 1 0	
4. Summary includes suggestions for how to increase the likelihood of clear communication with someone from a different background	3 2 1 0	
5. Summary includes a description of similarities and differences of business practices in the U.S. and the interviewee's native country	3 2 1 0	
6. Summary includes an explanation of the effectiveness of your group in this activity	3 2 1 0	
7. Summary includes examples of how your group functioned effectively and ineffectively and suggests ways to improve effectiveness	3 2 1 0	
8. Summary is professionally presented with correct grammar, spelling, and punctuation	3 2 1 0	

Teacher ______________________________ Date ____________________

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Directions to Teacher

1. Review the directions and scoring guide.
2. You may wish to brainstorm the kind of information students could gain from talking with the foreign exchange student.
3. Remind students that the goal of this assessment is not only to gain information, but also to work together as a team. Explain how to use the Peer Evaluation scoring guides.

Nonverbal Communication in International Business

Standards

J.12.8	Demonstrate the ability to work independently
J.12.9	Give examples of how nonverbal messages have different meanings in various cultures

Directions

In this activity, you will research various cultural practices unique to a country of your choice. Then you will develop a brochure that functions as a business person's guide to that particular country.

1. Choose a country to research.
2. Research the country's cultural practices using the Internet. Find the following information:
    - The country's general location
    - Major cities
    - Which non-verbal messages have different meanings than in the U.S.
    - Common business and recreational dress
    - Rules and practices for dining out
    - Other cultural practices one might encounter in a visit to the country
    - Two other topics of your choice
3. Compile your information into a brochure entitled *A Business Person's Guide to Visiting* ___________ (the name of your country). The brochure must be printed on an 8-1/2 x 11 sheet of paper (you can use both sides and either tri-fold or fold in half). Word process or hand-write your brochure. Insert graphics if desired. Make sure your brochure includes a section for each of the bullets under #2 above and meets the requirements on the scoring guide.

Student Name ______________________ Date __________________

Nonverbal Communication in International Business

Scoring Standard

You must achieve a minimum score of 12 to demonstrate competence. No criterion can receive a rating of "0".

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	**Rating**	**Comments**
1. You produce a professional looking brochure suitable for a business audience	3 2 1 0	
2. Brochure gives details on location and major cities	3 2 1 0	
3. Brochure includes differences in non-verbal messages	3 2 1 0	
4. Brochure includes cultural differences in dress for both business and recreation	3 2 1 0	
5. Brochure includes rules and practices for dining out	3 2 1 0	
6. Brochure includes any other cultural differences necessary for the audience	3 2 1 0	

Teacher ____________________________ Date __________________

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Directions to Teacher

Give students possible sites to research. Discuss different factors for successfully demonstrating the ability to work independently. Discuss with your group examples of U.S. business practices as well as give examples of non-verbal messages with different meanings. Find a number of travel agents who would be willing to give comments on the completed brochures.

Delegation Activity Sheet

Directions: Indicate the name of the person you would nominate for each position listed below. Then explain why you chose that person.

Position	**Name of Person Nominated**	**Reason Why**
President		
Vice-President		
Secretary		
Treasurer		
Parliamentarian		

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Standard

J.12.10 Demonstrate delegation skills

Directions

For this activity read the scenario below. Based on the strengths and weaknesses of the people listed below, delegate the following positions: president, vice-president, secretary, treasurer and parliamentarian. Explain why you chose the particular position for each person. Record your decisions on the Delegation activity sheet.

Scenario

You have just been appointed to the executive committee of a professional organization—National Businesspersons Extraordinaire (NBE). It is election time within the organization. The following positions need to be voted on: president, vice president, secretary, treasurer and parliamentarian. Your job is to nominate the following people for these positions based on the credentials listed below:

- **Kristopher Johnson:** Kristopher is a very focused, quiet young man. He has been a part of this organization for two years since graduating from Harvard School of Business. He's a hard worker in his position as a recruiter for the corporate offices of a major department store.
- **Jim MacPhail:** Just four years ago, Jim's company, Flowering Gardens was on the verge of bankruptcy. Jim's boss, the owner of the company, credits Jim with getting the company out of financial trouble. Jim proved he was a financial guru in the marketing portion of the company which had been neglected for so long. Today, Jim is still working for Flowering Gardens.
- **Jennifer Jones:** Jennifer is CEO of a major furniture company. She started in the company when she was in high school. She has slowly worked her way up. She prides herself on the new and innovative ideas she continually brings to her company.
- **Wendy Thompson:** Wendy has had her hands in every department of a number of major companies. Her 25 years of business experience have given her the title of National Businessperson Extraordinaire of the Year for 1997.
- **Sally Smith:** Ms. Smith is a very organized person. She is someone who never forgets to dot her I's and cross her T's as an underwriter for the largest insurance company in the five state region. You can always count on her to play by the book.

Student Name ______________________ Date __________________

Delegation Skills

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	**Rating**	**Comments**
1. You nominate someone for each position	3 2 1 0	
2. You indicate why you nominated the person	3 2 1 0	
3. Your rationale is reasonable	3 2 1 0	
4. Your work is professionally presented	3 2 1 0	

Teacher ____________________________ Date __________________

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Directions to Teacher

Lead a discussion with your class on the various qualities necessary for president, vice president, secretary, treasurer, and parliamentarian of a business organization. There is no right or wrong answer, but the reasoning used to nominate the candidates should be evaluated.

Standard

J.12.11 Define ethics

Directions

For this activity you will analyze a real-life situation in which ethics were violated.

1. Choose a situation to analyze. You could use a situation in your own life, a situation encountered by someone you know, or a situation described in a magazine or newspaper.
2. Write a one-page essay analyzing the situation. Include the following items in your essay.
   - Describe the ethical problem
   - Define ethics
   - Explain why ethics were violated based on your definition
   - Identify other choices the person may have had in dealing with the dilemma
   - Suggest an ethical alternative to the situation

Student Name ______________________ Date __________________

Ethics Essay

Scoring Standard

You must achieve a total of at least 12 points on this scoring guide to demonstrate competence. No criterion can receive a rating of "0". If a source citation is required the last criterion must be rated "yes."

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	Rating	Comments
1. Essay includes a description of the ethical problem	3 2 1 0	
2. Essay includes a definition of ethics	3 2 1 0	
3. Essay includes an explanation of why ethics were violated based on the definition	3 2 1 0	
4. Essay includes a description of other choices the person may have had in dealing with the situation	3 2 1 0	
5. Essay includes a suggestion of an ethical alternative for the situation	3 2 1 0	
6. Essay is word processed and contains correct spelling, grammar and punctuation	3 2 1 0	
7. Essay includes source citation if appropriate	yes no	

Teacher ______________________________ Date __________________

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Directions to Teacher

1. Review the directions and scoring guide.
2. Discuss the definition of ethics. Relate it to the standards of morality, trust, and fairness.
3. Help students find situations to analyze. You may choose to present students with a particular situation rather than have students find one on their own.

Practice Teamwork

Standards

J.12.12 Explain why motivation, leadership, and trust are important to a team

J.12.13 Compare and contrast alternative leadership styles

Directions

You will be involved in a team-building activity. Everyone will have on a blindfold. There is to be absolutely no talking. Your directions will come from the teacher during the actual activity. When finished with the activity, write answers to each of these questions.

1. What was the motivation in this activity?
2. Can you name at least two leaders who emerged in the group? Who were they? What did they do that set them apart as leaders? What were the similarities and differences between their leadership styles?
3. Was trust involved in this activity? How?
4. If everyone in the class worked in a company together, or played on the same basketball team, how would the motivation, leadership, and trust shown in this activity transfer to that work or team setting?

Student Name ________________________ Date ____________________

Practice Teamwork

Scoring Standard

You must achieve a total of at least 16 points on this scoring guide to demonstrate competence. No criterion can receive a rating of "0".

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	Rating	Comments
1. You participate in the team building activity	3 2 1 0	
2. You state the motivation to complete the activity	3 2 1 0	
3. You identify the leaders that emerged in the group and describe why they were leaders	3 2 1 0	
4. You describe the similarities and differences in their leadership styles	3 2 1 0	
5. You explain how trust was involved in the activity	3 2 1 0	
6. You relate the classroom activity to a real life company or team situation	3 2 1 0	
7. Written work contains correct spelling, grammar and punctuation	3 2 1 0	
8. Written work is professionally presented	3 2 1 0	

Teacher ____________________________ Date ____________________

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Directions to Teacher

1. Make blindfolds available for each class member. Conduct the activity in a large open space.
2. Direct students to put on the blindfolds. Move them around the open area so they are spread out and facing different directions.
3. Direct students to arrange themselves in a line in order from the tallest student to shortest student. Students must conduct the activity with absolutely no talking.
4. Give the students about 15 minutes to complete the activity. If the students are progressing along nicely, you may want to let them finish the activity regardless of time frame.
5. Review the directions and scoring guide for the assessment. Allow time for students to write answers to the questions. Lead a class discussion on the responses.

Consumer Trust Interview

Standard

J.12.14 Explain the importance of consumer trust for the successful conducting of business

Directions

For this activity you will interview an owner/manager of a local business to find out how consumer trust relates to his/her company.

1. Choose a company that interests you. Record the name of the company on the Interview Information Sheet. Call and make an appointment for the interview. You may conduct the interview over the phone or in person. You will need about 15 minutes for the interview.
2. On the Interview Information Sheet, write down five to seven questions you would like to ask during the interview. Make sure at least three of your questions revolve around the importance of consumer trust to the company.
3. Conduct the interview.
4. When finished with the interview, write a thank-you letter to that person explaining what you learned about that business as well as the importance of consumer trust to that business. Keep a copy of the thank-you letter to turn in to your teacher and send the other copy to the person you interviewed.
5. Submit your Interview Information Sheet, a copy of your thank-you letter and the scoring guide to your teacher for evaluation.

Interview Information Sheet

Name______________________________

Name of Person Interviewed ______________________________

Company ______________________________

Position ______________________________

Phone Number ________________ E-mail ______________________________

Address ______________________________

Time/Place of Interview ______________________________

Interview Questions: (List the Interview Questions Below)

Student Name ______________________ Date ________________

Consumer Trust Interview

Scoring Standard

You must achieve a total of at least 12 points on this scoring guide to demonstrate competence. No criterion can receive a rating of "0".

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	**Rating**	**Comments**
1. You record the general information about your interview on the Interview Information Sheet	3 2 1 0	
2. You develop five to seven open, focused interview questions	3 2 1 0	
3. At least three interview questions pursue the importance of consumer trust to the company	3 2 1 0	
4. You write a thank-you letter to the person you interviewed using proper letter format	3 2 1 0	
5. Thank-you letter states what you learned about consumer trust	3 2 1 0	
6. Thank-you letter is word processed and contains correct spelling, grammar and punctuation	3 2 1 0	

Teacher ___________________________ Date ________________

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Directions to Teacher

1. Review the directions and scoring guide. You may want to pre-approve the students' interview choices before they conduct the interviews.
2. Discuss how to conduct the interview. Define consumer trust.

Business Standards K

Career Development

CONTENT STANDARD

Students in Wisconsin will explore careers and develop skills necessary to make meaningful decisions in a variety of business careers. Students will develop a career cluster focus based on their career development process.

Rationale: Career development encompasses an individual's total life. In our changing society, career enhancements and career changes will become common. Individuals must be able to use the tools, resources, and guidance made available to them to make informed decisions.

PERFORMANCE STANDARDS

K.12.1 Assess and analyze personal talents and interests as they relate to career decisions
K.12.2 Describe how personal qualities transfer from school to work
K.12.3 Identify ways to overcome weaknesses and capitalize on strengths
K.12.4 Update and present career portfolio that includes career research materials and work samples
K.12.5 List sources of training related to career plan
K.12.6 Analyze projected career opportunities and trends
K.12.7 Create a career and education (lifework) plan for transition from high school
K.12.8 Demonstrate habits needed for career success
K.12.9 Experience paid/unpaid work opportunities
K.12.10 Explain the benefits of community involvement
K.12.11 Discuss social and ethical standards of the workplace
K.12.12 Prepare documents for a job campaign
K.12.13 Participate in a mock interview
K.12.14 Describe employment trends in the workplace

Prepare a Personal Career Portfolio

Standards

K.12.1	Assess and analyze personal talents and interests as they relate to career decisions
K.12.2	Describe how personal qualities transfer from school to work
K.12.3	Identify ways to overcome weaknesses and capitalize on strengths
K.12.4	Update and present career portfolio that includes career research materials and work samples

Directions

In this activity you will prepare or update your personal career portfolio.

1. Obtain a portfolio to use for this task. Your instructor may specify a specific type; options include 3-ring binders, pocket folders, file folders, large envelopes, etc. Put your name on the portfolio.
2. Complete at least two skill/aptitude instruments. Match your skills with tasks performed by workers in three different careers. Write a summary of your findings. Include the following:
   - Three skills or aptitudes you possess
   - At least three jobs or careers that require those skills
   - A description of how your skills would be beneficial for each career

   Place the results from the instruments and your written summary in your portfolio.
3. Prepare a one-page summary of how your work and personal values will affect your career choices. Place your summary in your portfolio.
4. Complete the Personal Qualities Activity Sheet. Place it in your portfolio.
5. Complete the Personal Weaknesses Action Plan. Place it in your portfolio.
6. Choose at least five visual or written samples of your work performance. Place them in your portfolio.
7. Create a list of ten career research sources. Include local, state, and national resources such as web sites, career center addresses, etc. Place your list in your portfolio.
8. Conduct a job search using two of the sources you identified. Search for jobs related to your personal talents and interests. Place your search results in your portfolio.
9. Present your portfolio in a personal meeting with your instructor.

Personal Qualities Activity Sheet

Personal Qualities

Personal qualities are those life skills that are required for most every occupation. Personal qualities include: acting responsibly, thinking critically, working productively and communicating clearly. In the space below, identify three of your personal qualities and then give an example of how you have demonstrated each quality recently.

Personal Quality	Example

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Personal Weaknesses Action Plan

Personal Weaknesses

In the space below, identify three personal weaknesses you would like to overcome. Then indicate an action you can take to work on each weakness.

Personal Weakness	What You Will Do To Overcome the Weakness

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Student Name ______________________ Date __________________

Career Portfolio

Scoring Standard

You must achieve a "yes" rating on each criterion to demonstrate competence.

Scoring Guide

Criteria	**Rating**	**Comments**
1. You prepare at least a one-page written summary of how your skills and aptitudes match general career tasks using the results of at least two skill/aptitude tests	yes no	
2. Portfolio includes the results of two skill/aptitude tests	yes no	
3. Portfolio includes a summary matching your skills to three different careers	yes no	
4. Portfolio includes a one-page summary of how your work and personal values will affect your career choices	yes no	
5. Portfolio includes a completed Personal Qualities Activity Sheet	yes no	
6. Portfolio includes the Personal Weaknesses Action Plan	yes no	
7. Portfolio includes at least five visual or written samples of your work performance	yes no	
8. Portfolio includes a list of ten career research sources	yes no	
9. Portfolio includes search results from two job search sources	yes no	
10. You present your portfolio to your instructor in a meeting	yes no	

Teacher ___________________________ Date __________________

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Directions to Teacher

1. Review the directions and scoring guide for the portfolio.
2. Establish timelines for the portfolio pieces.
3. Set up a schedule for portfolio presentations. (You might have students practice with a peer first.)

Standards

K.12.5 List sources of training related to career plan
K.12.7 Create a career and education (lifework) plan for transition from high school

Directions

For this activity, you will create a career plan outlining the post-secondary education and training needed for your career choice. To create your career portfolio complete the following activities:

1. Complete the Job Preferences activity sheet. Choose two careers you would like to research for this activity.
2. Write a one-page paper for each career choice. Include the following information:
   - The skills and aptitudes needed for the career. Use any available resources—the Internet, magazines, friends and family members. Find out the specific skills and aptitudes needed.
   - The type of education needed for the career. Should you go to a four-year college, a two-year technical school, etc.? Is a master's degree appropriate?
   - The kinds of jobs you could get now (in high school) that would give you an opportunity to gain some experience valuable to this career choice.
   - The advantages and disadvantages of the career.
   - The salary range for the career choice.
   - The projected market for workers in the career.
3. Draw a map detailing what you need to do to make each of these careers a reality. Start with where you are now and include work experience, community service experience, high school courses, post-secondary education, professional exams, continuing education or other experiences you need to start the career.

Job Preferences

Aptitudes

Part I: Think about yourself, your friends and family members. Looking at the following statements, fill in the blank line with the individual whom you think most displays that aptitude.

____________________ has an aptitude for music.

____________________ has an aptitude for math.

____________________ has an aptitude for working with children.

____________________ has an aptitude for cooking.

____________________ has an aptitude for listening to others.

____________________ has an aptitude for drawing.

____________________ has an aptitude for fixing things.

____________________ has an aptitude for remembering names.

____________________ has an aptitude for singing.

____________________ has an aptitude for writing.

____________________ has an aptitude for working with numbers.

____________________ has an aptitude for foreign languages.

____________________ has an aptitude for swimming.

____________________ has an aptitude for sewing.

____________________ has an aptitude for working with his/her hands.

____________________ has an aptitude for sports.

____________________ has an aptitude for working with animals.

____________________ has an aptitude for putting people at ease.

____________________ has an aptitude for thinking logically.

____________________ has an aptitude for acting.

Part II: List all of the aptitudes on the previous page that you have. Are there any others that you have that are not listed?

Part III: Brainstorm a list of five career choices that require some of the same aptitudes that you have.

Student Name ______________________ Date __________________

Career Map

Scoring Standard

You must achieve a rating of "satisfactory" on 14 of the 16 items on the scoring guide to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely.

Scoring Guide

Criteria	Rating	Comments
1. You complete Part I of the Job Preferences activity sheet	S U	
2. You rank the job preferences on the Job Preferences activity sheet	S U	
3. You give a reasonable rationale as to why a job preference is important or unimportant on the Job Preferences activity sheet	S U	
4. You identify five career choices suitable for your job preferences on the Job Preferences activity sheet	S U	
5. You choose two career choices and write a one-page paper about each career choice	S U	
6. Paper includes a list of specific skills and aptitudes needed for each career choice	S U	
7. Paper includes a list of the education necessary for each career choice	S U	
8. Paper includes a list of any work experience you could gain in high school that would be valuable to the career	S U	
9. Paper includes a list of the advantages and disadvantages of the career	S U	
10. Paper includes the salary range for the career	S U	

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Standards

K.12.9 Experience paid/unpaid work opportunities
K.12.10 Explain the benefits of community involvement

Directions

For this activity you will participate in a local community activity and then write a reflection paper on your experience.

1. As a class or within a small group, identify several specific organizations in your community that serve the needs of target populations. Consider organizations in many categories: human/social service agencies, scouting programs, hospitals, religious programs, environmental and business organizations, senior citizen groups, clubs, etc. You may want to use your local newspaper, telephone book, or Chamber of Commerce materials to locate specific groups.
2. Select one of the organizations that interests you, one with which you already have some connection, or one that is readily accessible to you. Think about skills you have to share with the group. For example, if you are skilled in computers, athletics, reading, or the arts, link with a group where you can use those skills. Make sure the organization you select can use you as a volunteer within the time frame specified by your instructor.
3. Submit the following information to your instructor:
    - Name of the organization
    - Mission of the organization
    - Target audience for the organization
    - Why you chose the organization
    - What (specifically) you plan to do to participate in the organization
4. Become involved in the service/event. Be a participant as well as an analyst. Collect data relative to the impact of the service/event on the target population. Note how the event meets the needs of the target audience. Note whether or not progress is made toward the mission of the organization.
5. Prepare a written analysis of your experience. Make sure your analysis meets all of the requirements on the scoring guide.

Student Name ________________________ Date ___________________

Community Involvement Analysis Paper

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	**Rating**	**Comments**
1. Analysis includes a description of the organization	3 2 1 0	
2. Analysis includes a description of the target population served by the organization	3 2 1 0	
3. Analysis includes a summary of the service/ event you participated in (specifically) and the role you played	3 2 1 0	
4. Analysis includes a description of the impact of the service/event on the target population	3 2 1 0	
5. Analysis includes a description of the impact of the service/event on you	3 2 1 0	
6. Analysis includes a reflection on the impact of the service/event on the community	3 2 1 0	
7. Analysis is supported by specific examples	3 2 1 0	
8. Analysis is professionally presented	3 2 1 0	
9. Analysis evidences correct spelling, grammar, and punctuation	3 2 1 0	

Teacher ______________________________ Date ___________________

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Directions to Teacher

This task can be completed individually or in small groups; but each student must create his/her own analysis. Community service projects might include any of the following: tree plantings, environmental clean-ups, computer service work for senior citizens, reading for the visually impaired, services for the hospitalized or recovering, tax preparation, etc.

Social and Ethical Standards

Standard

K.12.11 Discuss social and ethical standards of the workplace

Directions

For this activity you will interview a person of your choice regarding the social and ethical standards present at his/her workplace.

1. Choose a person to interview. You may conduct the interview in-person, over the phone or via e-mail. The interview will take about 15 minutes to complete.

   The person you interview must currently be employed at a company with ten or more employees. He/she must have worked there for at least one year.
2. Conduct the interview. Use the Social and Ethical Standards Interview Guide to assist you. Record your responses.
3. Synthesize your findings into a brief report.
   - Indicate who you interviewed, where he/she is employed, job he/she performs, length of employment, etc.
   - Identify three social standards at the workplace. Give an example of how each functions at that company. Give an example of a time when one of the standards was violated and what happened.
   - Identify three ethical standards at the workplace. Give an example of how each functions at that company. Give an example of a time when one of the standards was violated and what happened.
   - Conclude with a personal reflection on social and ethical standards in the workplace.

Social and Ethical Standards Interview Guide

Name of Person Interviewed ____

Company ____

Position ____

Length of Employment ____

1. What are some of the social standards (rules) of your work place? (Note: You will need three examples for your paper.) Think about the way people dress, how workers address each other, rules for lunch time or place, who eats with whom, etc.)

2. Tell about a time when someone violated one of the "rules." What happened?

3. What are some of the ethical standards for your work place? (Note: You will need three examples for your paper.) Think about how people use/abuse company materials, the use of time-off, breaks, vacation days, etc.

4. Tell about a time when someone violated one of the "rules." What happened?

Student Name ______________________ Date __________________

Social and Ethical Standards Report

Scoring Standard

You must achieve a rating of at least "2" on each criterion to demonstrate competence.

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	Rating	Comments
1. Report includes a description of who you interviewed, where he/she is employed, the job he/she performs, length of employment, etc.	3 2 1 0	
2. Report includes three social standards at the workplace and an example of each	3 2 1 0	
3. Report includes three ethical standards at the workplace and an example of each	3 2 1 0	
4. Report includes an example of what happened when social standards were violated	3 2 1 0	
5. Report includes an example of what happened when ethical standards were violated	3 2 1 0	
6. Report includes a personal reflection on the role of social and ethical standards in the workplace	3 2 1 0	
7. Report is professionally presented	3 2 1 0	

Teacher ____________________________ Date __________________

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Directions to Teacher

1. Lead a discussion on social and ethical standards in the workplace. Brainstorm a list of social standards and another list of common ethical standards. Make copies of the lists for students to use during their interviews.
2. Review the directions and scoring guides. Distribute copies of the Social and Ethical Standards Interview Guide handout.

Apply for a Job

Standard

K.12.12 Prepare documents for a job campaign

Prompt

You are graduating from high school and are in search of a summer job. You would like to take advantage of some of the experiences you have had during your high school career. Search the classified section of your local newspaper (or a newspaper of your choice) and find a job for which you would be qualified. Prepare a letter of application and resume for the position. Also complete the application form for this position. Obtain the application form from your teacher. Make sure your work meets the requirements on the scoring guide.

Directions

In this activity you will complete a job application form, a letter of application and a resume for a job posting. See the scoring guide for the criteria your letter and resume should contain.

Student Name ______________________ Date ____________________

Apply for a Job

Scoring Standard

You must achieve at least 38 points on this scoring guide to demonstrate competence. No criterion can receive a rating of "0".

Rating Scale

3= Exceeds expectations
2= Meets expectations
1= Does not meet expectations fully
0= Information is missing, incorrect, or incomplete

Scoring Guide

Criteria	**Rating**	**Comments**
1. Application form is filled out completely	3 2 1 0	
2. Application form is neat and legible	3 2 1 0	
3. Application form contains accurate information	3 2 1 0	
4. Letter of application is formatted correctly	3 2 1 0	
5. Letter of application is addressed to the appropriate person	3 2 1 0	
6. Letter of application includes position you are applying for	3 2 1 0	
7. Letter of application includes at least one reason why you should be considered for the position	3 2 1 0	
8. Letter of application "sells" your skills and abilities	3 2 1 0	
9. Letter of application asks for interview and includes your phone number	3 2 1 0	
10. Resume is neat and legible	3 2 1 0	

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Criteria	Rating	Comments
11. Resume contains heading (home, address, phone number)	3 2 1 0	
12. Resume contains accurate and complete information	3 2 1 0	
13. Resume includes information on educational experiences	3 2 1 0	
14. Resume includes information on work/other experiences	3 2 1 0	
15. Resume indicates how to contact references	3 2 1 0	
16. Resume and letter of application are on high-quality bond paper	3 2 1 0	
17. Letter of application and application form are signed by applicant	3 2 1 0	
18. All documents are word processed	3 2 1 0	
19. All documents contain correct spelling, grammar and punctuation	3 2 1 0	

Teacher ______________________________ Date ____________________

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Directions to Teacher

The student should apply for a position for which he or she is qualified. Obtain a sample application form for students to complete.

Participate in a Mock Interview

Standard

K.12.13 Participate in a mock interview

Prompt

Next month local businesses will be represented at the annual Job Fair. During the Job Fair you will have the opportunity to apply for and interview for a variety of summer jobs. After reviewing the posted job openings, select a job that most closely matches your skills and interests. Follow the directions to schedule an interview.

Directions

For this activity you will participate in a mock interview.

1. To prepare for your interview submit the following items to your teacher:
   - A description of a job you want to apply for (or classified advertisement posting)
   - A letter of application
   - A resume

   These items will be given to the interviewer prior to the interview.
2. Participate in the mock interview at the time and place assigned by your teacher.
   - Dress appropriately for the interview.
   - Plan to arrive 5 minutes early. There may be someone interviewing ahead of you, so wait outside until asked to come in.
   - Be prepared to ask at least two questions about the job.

   After the interview, the interviewer will give you a few words of feedback and complete the scoring guide.
3. Write a thank you letter to the interviewer following the interview. Give or mail the original to the person who interviewed you and submit a copy to your teacher.

   (Optional) Your performance may be videotaped so you, your instructor, and peers may also critique your performance.

Student Name ______________________ Date __________________

Participate in a Mock Interview

Scoring Standard

You must achieve a "satisfactory" rating on 8 of the 11 criteria to demonstrate competence.

Rating Scale

S= Satisfactory; completed the criterion accurately and completely

U= Unsatisfactory; did not cover the criterion accurately and completely

Scoring Guide

Criteria	Rating	Comments
1. You present interviewer with a completed job application, letter, and resume	S U	
2. You arrive for the interview on time	S U	
3. You are dressed at least "one step" above that expected of daily wear; wear no tennis shoes, blue jeans, or T-shirts	S U	
4. You greet the interviewer with confidence and warmth	S U	
5. You answer questions thoroughly	S U	
6. You show sincere interest and enthusiasm for the position	S U	
7. You ask questions that show knowledge about the company and insight about the job, but are not benefits-related	S U	
8. You maintain eye contact	S U	
9. You demonstrate comfortable, poised manner	S U	
10. You are courteous	S U	
11. You express appreciation to the interviewer	S U	

Teacher ________________________ Date ________________

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Directions to Teacher

Post a variety of job ads in the classroom that include requirements that match the students' skills. Arrange for business representatives to be available to interview learners during a mock (or actual) Job Fair, or arrange for other school employees or parents to conduct the mock interviews. Allow about 15 minutes for each interview. Secure a site for the interviews either on campus or at business sites.

Distribute the scoring guides and the student packets (job ad, letter of application and resume) to the interviewers in advance. Provide interviewers with a general list of interview questions that could be used to interview the students. Note that the interviewer should provide some verbal feedback to the student immediately following the interview and then complete the scoring guide later and submit it to you for distribution to the student.